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ABSTRACT

A marketing plan designed to increase enrollment and community support for early childhood education programs in Hawaii is presented. Expansion, economic and demographic trends, changes in state funding policies, and inadequate marketing had resulted in a drop in alternative school enrollment. The resulting support base was unable to support adequate cash flow for the school, and its survival was in jeopardy. The core of the proposed marketing plan was a process of clarifying the school's mission, vision, and values. From this work, tools for a market survey and customer values match were designed and implemented. The resulting data was compiled, analyzed, and used to refine marketing. The strategies employed increased inquiries, enrollment, and the ratio of inquiries to enrollment, and kept the school fiscally solvent. The processes employed and the data collection techniques learned carried over into general administration and programs, and enhanced the overall quality of the organization. The appendices include a copy of the consensus tool, the customer values match and marketing survey, the respective data analysis, and the practicum calendar. Contains 28 references. (Author/AA)

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PRA 689
Practicum Report
April 30, 1995

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Developing a Marketing Strategy for an Early Childhood Education Program in Hawaii

by

Virginia Hammon
Cohort 61

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A Practicum Report Presented to the
Master's Program in Child Care, Youth Care, and Family Support
in Partial Fulfillment of the Requirements
for the Degree of Master of Science

NOVA UNIVERSITY
1995

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AUTHORSHIP STATEMENT

I hereby testify that this paper and the work it reports are entirely my own. Where it has been necessary to draw from the work of others, published or unpublished, I have acknowledged such work in accordance with accepted scholarly and editorial practice. I give testimony freely, out of respect for the scholarship of other workers in the field and in the hope that my own work, presented here, will earn similar respect.

4/28/95
Date

Signature of Student

ABSTRACT

Developing a Marketing Strategy for an Alternative Early Childhood Education Program in Hawaii. Hammon, Virginia, 1994: Practicum Report, Nova University, Master's Program for Child Care, Youth Care, and Family Support. Descriptors: Marketing/ Early Childhood Education Fund-raising/ Public Relations Publicity Mission/ Vision/ Values.

Due to expansion, economic and demographic trends, changes in state funding policies, and inadequate marketing the enrollment in an alternative school setting had dropped; the inadequate support base was unable to maintain adequate cash flow, and the school's survival was in jeopardy.

The author designed and implemented a strategic marketing plan intended to increase enrollment and community support for the programs. The core of the strategy was a process of clarifying the school's mission, vision and values. From this work, tools for a market survey and customer values match were designed and implemented. The resulting data was compiled, analyzed, and used to refine marketing. The strategies employed increased inquiries, enrollment and the ratio of inquiries to enrollment and kept the school fiscally solvent. The processes employed and the data collection techniques learned carried over into general administration and programs, and enhanced the overall quality of the organization.

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CHAPTER I

Introduction and Background

The Setting in Which the Problem Occurs

The setting for this problem is a small alternative private school in Hawaii. The school serves 150 children from 18 months to 12 years at three separate campuses, two in one community, and a third 45 miles distant. The school has a part-time and full time staff of 32, including the full time equivalent of 2.5 persons in administration, one person in maintenance and housekeeping, and the remainder in professional and paraprofessional teaching faculty.

The school serves 30 toddlers, 84 preschool children, and 36 elementary children from 1st through 6th grade. A student: teacher ratio of 6:1 is maintained in the toddler programs and 12:1 in the preschool and elementary. Programs are available on an academic calendar (September - May, plus June-July), and a year round calendar for working parents, from 7:30 A.M. to 5:00 P.M., five days per week.

The facilities are all leased. Eight, one, and twenty-eight years remain on the leases. The school is working toward a single campus in each community that unifies the programs, toddler through elementary.

The school is a Montessori school, and a 14 year affiliate of the American Montessori Society. The Montessori philosophy and program honors individuality, focuses on the classroom as a system, and stresses the importance of the teacher's role in preparing a carefully structured environment, serving as a catalyst, observer, system assessor, and continuous improvement agent

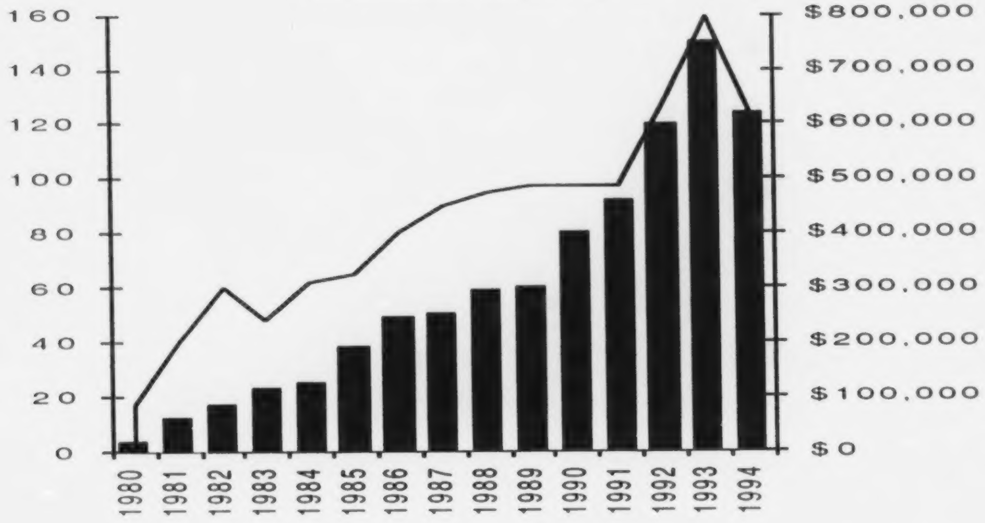
(Montessori, 1975; Chattin-McNichols, 1992). The common training and cohesive philosophy form a strong foundation for a corporate system analysis.

In 1980, the practicum student was one of three founding board members of this nonprofit corporation, and the only founder still with the school. A board, recently rejuvenated, consists of six members. All but one of the board are parents of children within the school. There are representatives to the board from the parent organizations, the staff, and the administration. The board members have expertise, energy and enthusiasm, but none have substantial wealth or key connections to the wealthy segment of our community.

The 1993-94 expense budget was $750,000, and the projected 1994-95 budget is $620,000. Tuition has traditionally covered about 95% of the program cost, and the school relies on fund-raising and grants to cover the other 5%. Unable to secure adequate additional funds for a new campus that opened in

Figure 1.

Enrollment & Income 1980- 1994



1992 in a low income housing project, operating funds were used to cover the start-up costs. The new campus has a commitment to serve 51% low income children, and in September 1993, the State of Hawaii cut its subsidies to these children. Without a short term or long term funding strategy to cover this commitment, 1993-94 saw a $60,000 operating deficit.

Last year the school received $13,700 in contributions from eleemosynary foundations for student financial aid. This amount went up to $15,700 for this year.

Parent organizations typically raise another $8-10,000 through fund-raising activities, usually one main event and several small fund-raisers. Limited attempts at an annual fund were made in 1990, 1991 and 1993. In each instance a single letter was mailed to the parent body, and a limited selection of alumni. The total proceeds never exceeded $3,500.

This year the school cut positions and the remaining payroll by 10% to avoid a shortfall in the operating budget. We approached the traditional banking community for a loan to finance our accounts payable. Bankers are reluctant to loan money to a nonprofit with no collateral, despite a record of payment on previous loans and a history of service to the community.

The Student's Role in the Setting

Scope of General Responsibilities

The student has been working as the head of school for almost eight years, and was one of the original founders 15 years ago. The school is a nonprofit corporation and the head of school reports monthly to a board of directors. The head of school leads the school community in accomplishing its mission. The mission is to educate for the 21st century, by providing a nurturing, prepared environment where children, parents, and staff joyfully develop their esteem, discipline, independence, motivation, and community responsibilities to their fullest potential.

This organization has a strong commitment to work as a team in a collaborative model that strives to reach consensus on all major issues. The head's core responsibility is to lead the school as a whole team, and to facilitate effective work unit teams. A participative management style is used; the head has extensive training in conflict resolution, negotiation, mediation, group and meeting facilitation. Leadership and facilitation support the school community's efforts toward fulfillment of the mission. The school is one of 16 small businesses chosen statewide, in a "Service Excellence Incubator Project." This pilot project is a collaboration of the Chamber of Commerce of Hawaii and the State Department of Labor and Industrial Relations, and is coordinated by the Pacific Region Institute for Service Excellence (PRISE). It provides the assistance of consultants, training and support in implementing tools for continuous organizational improvement, based on, but not limited to, W. Edwards Deming's model of "Total Quality Management" (Deming, 1986; Walton, 1986).

The head's other responsibilities include director of planning and development, personnel administration, financial administration and program administration. This person is also a representative of the school to the community through service on county and state boards. Because of the administrative nature of the student's position, a high degree of control was possible over the changes the practicum planned to introduce; the practicum project is in the area of development and fund-raising and these are areas where the head has major responsibility for the school's efforts. The school intended to add a nearly full time staff position, administrative assistant for development to make this effort easier. Economic factors made this impossible.

Team leadership

Team leadership is exercised with parents, faculty and the staff, to build community and partnership commitment. To develop and build teams within the school faculty, the head provides training in, and models team building skills; meetings are facilitated and conflicts mediated. To develop a partnership with parents, the head responds to inquiries and gives first time observers a program tour. The head also responds to parent concerns and facilitates family and staff conferences.

The student is able to provide training in anger management, conflict resolution, mediation, meeting and problem solving facilitation, principle-based negotiation, as well as basic communication skills.

Time for communicating as teams is a priority when scheduling and budgeting for staff, though economic considerations keep this time to a minimum. The head attends all board meetings, monthly meetings at each of the sites, staff team meetings as needed, all general parent nights and fund-raisers, and conferences with parents by either parent or teacher request. When there is a question of continuing relationship; the head responds to and mediates between parties with issues: parent/ teacher/ school, teacher/teacher, student/ teacher, student/ student. All non-routine conferences requested or initiated by parents or teachers are facilitated by the head, who represents school policies to parents and parent issues to staff, when communications are not clearly heard.

Program tours to prospective parents are an important piece of the head's responsibilities. The school's philosophy, principles, values and policies are reviewed and a parent interview helps assess whether this is the right school for this parent and child. At the interview, active communication and collaboration between parents, teachers, students and school community is promoted.

Planning and development

The responsibility for managing the process of both short term and long term planning and development rests with the head of school. Strategic planning is done with the board of directors; the goal is to provide an annual report to the board enabling a timely review of strategic plans. Records are kept of each stage of the planning process, which has been slowly evolving over a number of years. Research and preparation of options for long range plans, including future site development and funding strategies are also responsibilities of the head. Volunteer supervision for the planning and production of fund-raising events falls to the administrative staff. The head of school does all of the grant writing.

This coming year would have been the first time the school had staff support to carry out the above tasks, if cuts had not been necessary. The school has sent out single requests for donations in previous years, but has never developed and implemented an annual fund strategy or campaign. We set marketing and development as a key area of focus for this next year.

Personnel administration

The head of school provides leadership and management of personnel in three key areas: development, operations and evaluation.

To develop personnel, site directors are supported in planning and supervising training of new employees. All faculty participate in assessing training needs, and reviewing group training requests. With the available resources, faculty develop a training program to meet these needs. The head reviews individual training requests and, with key staff, makes decisions about who will be sent to outside training at the school's cost. Trained staff model and support a friendly attitude toward learning, and work with each other in focusing attention on the system that is allowing error, rather than on the individuals.

A personnel policy handbook and guidelines have been developed over the years with the staff. The head is responsible for planning and implementing hiring, firing and exit or termination procedures with the site directors. The administration prepares staff hiring packets, which include job descriptions, contracts and staff handbooks. The school has a salary scale and salary computation format that is used in determining compensation. The head supervises the maintenance of benefit programs, including staff tuition benefits, and health insurance.

Commitment to practices and procedures that promote harmonious and constructive relationships is a key to working as a collaborative team. Leadership in generating creative, workable solutions to problems that honor everyone's perspective is an important component of the head's duties.

The head also works with staff in evaluating performance; goals are set together, and measures of success are determined. The school's emphasis is on the classroom and the school as systems; evaluations are made of the operating systems, rather than individuals. Individuals participate fully in evaluating the systems within which they work, and their contribution. The head facilitates this process. When it is clear that there is a mismatch in values between an individual and the school community, the head completes a termination procedure.

Financial administration

The head of school is responsible for developing financial resources, preparing budgets, establishing and overseeing accounting procedures, maintaining budgetary controls, assuring compliance with all federal and state requirements, and presenting clear and timely reports to the government, funding agencies and the board.

Budgets are projected in January, with an August update when enrollments are firm. Tuition, scholarship and payroll schedules are prepared for board approval. The head prepares biannual cash flow projections in July and January, and year-end reports for all funding sources. When funding is tight, cash flow projections are done monthly.

The head develops and supervises accurate accounting systems, procedures and operations for all receipts and disbursements. She maintains budgetary controls, including reviewing all purchase orders over $100 or out of the ordinary, and signs all checks. Site directors and program heads are provided with annual budgets and interim reports. The head reviews all accounting practices for accuracy. She has designed and created all of our spreadsheets for reporting and assessment. She manages and performs all operations required in accounts payable, payroll and general ledger. Support staff handle accounts receivable.

Program administration

The head of school provides leadership in meeting long and short term program goals. Time is set aside for faculty to assess and define the school's values, mission and vision. Working with the whole school, and with program teams, program plans for the year are made, and assessment is made at weekly and monthly staff meetings. The head makes sure that all stakeholders participate in planning and development, and models an enthusiasm for studying current research, and a willingness to continuously evaluate the program, and her own work.

In her role as head, the student develops and supervises the implementation of school operating procedures, including admissions materials and forms, student and office record keeping systems, facility coordination, maintenance, safety and beautification. She supports the development and implementation of a parent education program, creates and maintains staff and parent handbooks, and supervises adherence to all local, state and federal requirements.

Representative to the community

The head of school is an active advocate for quality child care. She is aware of federal, state and county legislative action, and represents the school's interests at community meetings and forums. She has served on several county and state committees.

Responsibility for developing and implementing a public relations program falls to the head. She writes press releases and add copy, creates advertisements and brochures, and reviews all written material that goes out from the school for accuracy, spelling, grammar and appearance.

Student's Relationship to the Problem

The student has been at the helm for eight years, and has pushed for the expansion that has created the cash flow crunch. She has a high degree of control over the changes this practicum project plans to implement to address the problem.

The Student's Personal Background

The student grew up in a family of educators and has a B.A. in English and Secondary Education. She spent seven years managing a business in the middle east, before returning to the United States with her children sixteen years ago. In 1980, when her own four children were small, she founded this school. With another woman, she shared the responsibilities of administration on a volunteer basis for several years. The student has headed the school in a full time, professional capacity since 1987.

As a trained and experienced volunteer community mediator, she has done extensive work in conflict resolution, group facilitation, and communication skills development. She reads widely, staying current in child development, educational and business management trends.

The student is aware of the typical pattern of founding director, and has worked hard to create an organization that has a broad base of ownership amongst its faculty and staff. She has also served on the founding boards of two other nonprofit, community service organizations, including a statewide consortium of service agencies, and two years service on the Mayor's Committee on Children and Youth.

CHAPTER II

The Problem

Problem Statement

The school has critical short term and long term funding needs; there is a critical need to bring in funds as soon as possible both through increased enrollment and from community resources. The school ran a $60,000 operating deficit last year including unpaid bills from the previous year for the start-up cost of a new campus in a low income neighborhood. The new campus has a commitment to serve 51% low income children, and the major support was reduced last year creating a cash flow crisis. Outside funding is limited.

Low enrollment in all programs is compounding the cash flow problem. The ratio of enrollment to inquiry is at 27%. Retention from year to year, from 1992-93 to 1994-95, averaged 73%. Last year's dropout rate during the school year was 19%. At these ratios, there are inadequate inquiries to keep enrollment full.

The new campus opened in September 1992 with a commitment to serve 51% low income children by 1995. A loan commitment for start-up funds was withdrawn at the last minute, and start-up costs had to be covered from general operating funds. The school has received grants for initial leasehold improvements, furnishings and equipment, but the start-up operating costs have come out of our own funds. When we made the commitment to serve low income children, the State of Hawaii was paying up to the full cost of the program for qualifying parents. In September 1993, the State reduced this amount, to a maximum payment of $325 for all programs. This means that a toddler parent is funded for about half day. The parents who need the care usually need full day. This created a serious cash flow problem last year and will require both a short term and long term funding strategy to cover the difference between cost and available funding.

The school is facing its lowest fall enrollment in several years, due to a prolonged recession and severe unemployment. A new public school in our district has drawn 25% of our kindergarten and elementary students. There has been no marketing plan to either increase or to retain enrollment.

Financial aid to needy students totalled $125,000 last year. Only 14% of this was real money that came from fund-raising or grant sources. The rest was simply a reduction in tuition. Our school community fund-raising efforts have been providing an inadequate average of $8,000 per year. We have been receiving an average of $25,000 in grant funds for scholarship ($10,000) and new classroom furnishings and equipment ($15,000).

The school does not have a donor development plan, or annual fund campaign. Our support constituency is poorly defined; we do not stay in touch with alumni and have an accessible, minimal, data base for four years, out of the past fifteen. A marketing or fund campaign could grow from adequate strategic planning (Bryson, 1989).

The student began this project seeing the key problem as a need to develop strategies for increasing funding from outside sources, particularly major donors. Resources reviewed in fund-raising made the point that having a well defined, and "enrolled" support constituency is the foundation for fund campaigns; the people most likely to want to contribute are those who have strong connections to the institution (Flanagan, 1982; Lord, 1988; Vineyard, McCurley, 1987). In a time of reduced government spending, and greater demands on both philanthropic institutions and the general public, it is important to shift emphasis from getting donations per se, to focusing more on the development of donors and the development of institutions (Lord, 1988). This suggested that we needed to look at marketing as the foundation of a healthy institution; we needed to increase connections with people who share our vision and values and nurture these relationships. The National Association of Independent Schools (NAIS) reports that healthy schools do not rely on outside sources for much more than 5% of total operating revenues (1992). We were at 6% last year, and projections for 1994-95 were 10% without enrollment increase. A first need would be to increase enrollment of full paying students, and reserve outside funding sources for major capital or endowment campaigns.

A marketing plan was needed. The plan would include a vision, mission and statement of values. It would include a data based understanding of our existing and potential customer community. The plan would analyze our internal strengths and weaknesses, and the external opportunities and obstacles. The planning process would engage potential customers, donors and community leaders in visioning for our institution as a first step to giving them a sense of ownership in our mission (Bryson 1989). The plan would include specific actions for marketing to a customer base, and alumni base, and developing major funders and donors (Lord, 1988).

We had pieces of the above: a mission statement was developed in 1986 and needed review; pieces of vision work were done over the years without the strong continuity of a plan, implement, assess cycle. In September 1994 focus had been internal; we had not assessed our customer community. There were no specific plans for increasing and stabilizing enrollment or for developing major donors. Potential community leaders and donors were not enrolled in developing our institution.

Before this practicum began the school had mission and broad vision statements that were done in the late 1980's. We had found that vision and mission are relatively easy; they employ general terms on which it is easy to get consensus, especially in an alternative school that already has a foundation of consensus through the common training of its faculty. The "theory" came easy. However, the application and implementation of this mission and vision is done by a diverse group of people with differing perspectives. Conflicts had arisen because faculty and parents had fundamentally different ideas about what certain words and phrases meant in practice. It was apparent that understanding and defining our underlying values was imperative.

Documentation of the Problem

Documenting the problem proved to be a significant piece of the practicum work. Some significant data was available in records from general operating procedure. The data had never been compiled, reviewed or made useful. Other important information had never been asked in a systematic way.

Documentation fell into three general categories: inquiry, enrollment and retention; marketing tools; and, school, faculty and parent values. We were able to research and compile data on inquiry, enrollment, retention, and marketing tools from existing recorded data. Defining our own values and then assessing customer (parent) values and priorities became another major piece of the practicum work.

Inquiry, Enrollment and Retention

Capacity and enrollment

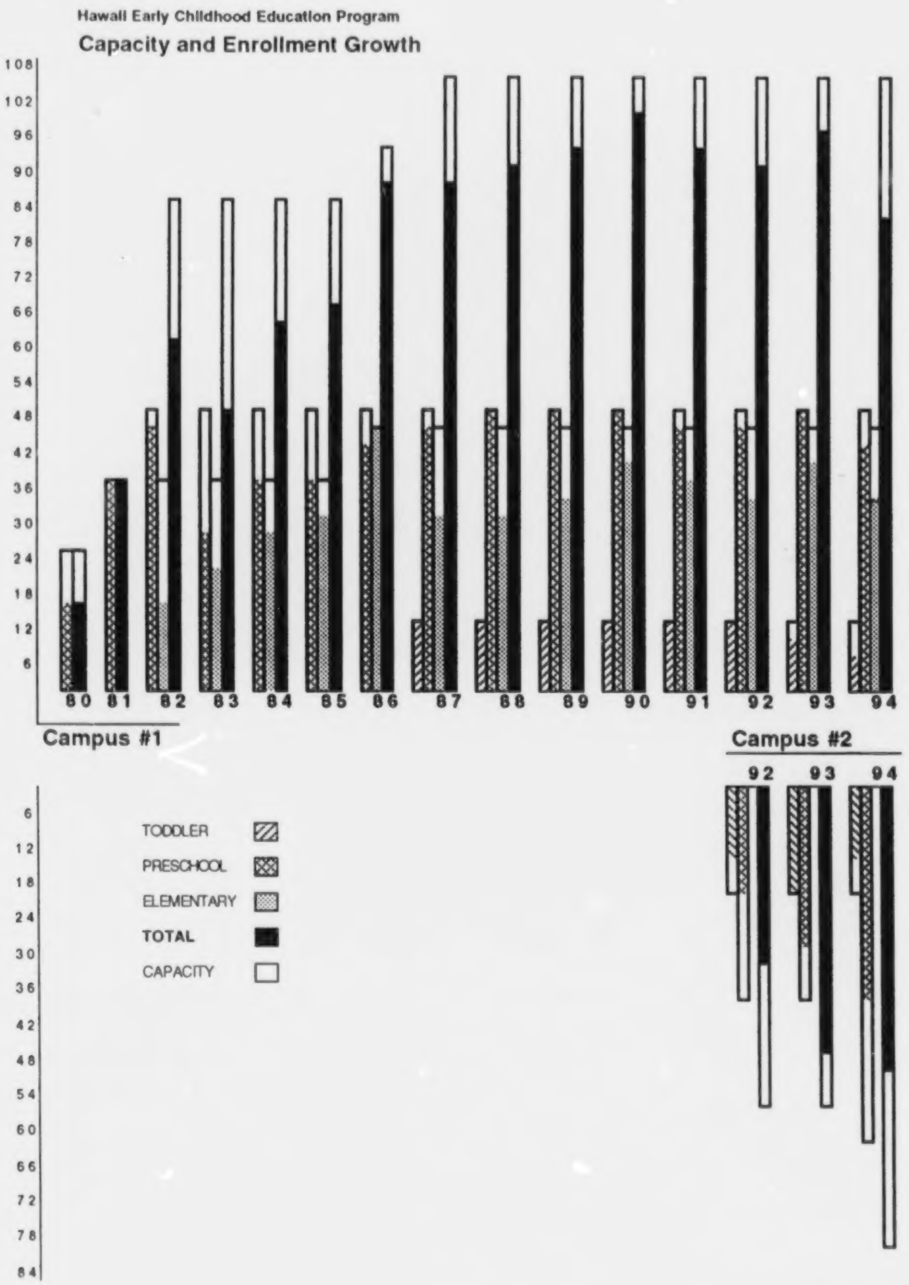
The school has increased capacity substantially several times over the years (Figure 2). In 1992, a new elementary campus was added. In 1987 toddler classroom space was added. "Campus #1" includes two campuses in one town (a toddler and preschool program in one, and elementary in another). Campus #2 is the new school in a low income housing project, 45 minutes distant. In 1992 a new campus was added in a community 45 minutes distant.

In 1983, another preschool opened in our community and enrollment dropped. It took until 1984 to return to the same total enrollment, and until 1987 to return to the same enrollment in the preschool program.

1990 was the peak of the market in this community. A recession began, coinciding with the Gulf War in fall 1990. Enrollments appeared to improve in 1993, before plummeting for fall 1994. The new campus showed strong growth pattern from 1992 to 1993, then leveled off. The heaviest declines are in the toddler and elementary programs.

School staff surveyed the other 18 preschools in West Hawaii. Twelve responded, and of these 12, enrollment was down to an average of 67% of last year. Jana Smith, a consultant with the Governor's Office of Children and Youth, reported that seven preschools in East Hawaii are closing this school year. Two of these are new, and simply could not make a start in this market. The others included schools that have been in operation for more than 10 years.

Figure 2



Hawaii Early Childhood Education Program

Capacity and Enrollment Growth

Inquiry and enrollment

Data was accessible from May 1993 to the present. Compiled and graphed this data shows that on average, 27% of the people who inquire, eventually enroll (Figure 3, 1992-93; Figure 4, 1993-94). In Figure 3 and 4, the enrollment numbers below represent the number of people in the inquiry columns above who eventually enrolled. Inquiry and enrollment may have taken place months or even years apart.

For the three months in 1992-93 for which data were accessible, the average number of inquiries per month was 25, average enrollment was 6 per month, and the average ratio of enrollment to inquiry, 23%.

In 1993-94, monthly inquiries averaged 21, monthly average enrollment was 5.5 and the ratio of enrollment to inquiry was 27%. Figure 3 and 4 also indicate that the most serious prospects are inquiring in November, March and April.

It will take several more years of data analysis to determine what patterns fall within a range of normal variation, and what variance represents genuine improvement. I was unable to find industry standards to compare with our own.

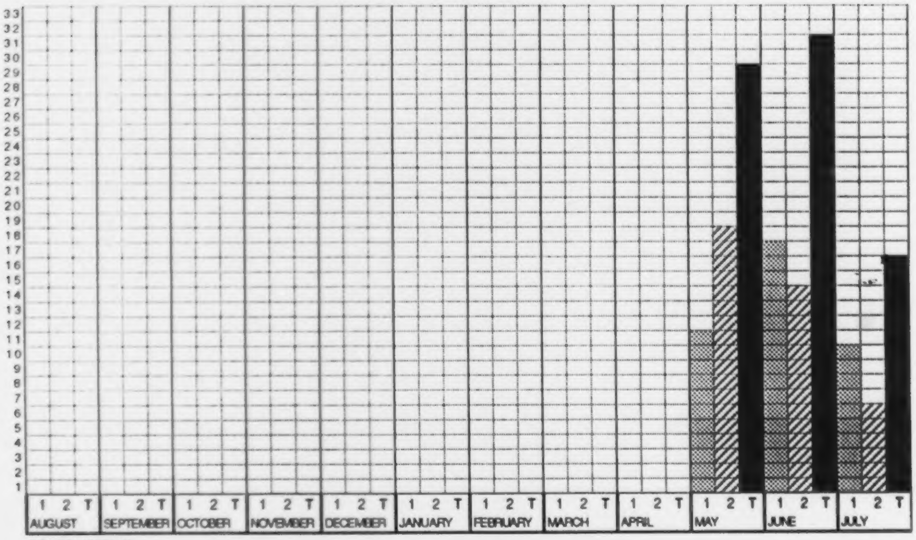
Figure 3

1992-93

Hawai'i Early Childhood Education Program

Inquiry and Enrollment

Campus #1 ▨ Campus #2 ▨ TOTAL ■



INQUIRY

PRESS ▲

ENROLLMENT

Percent of Inquiries Enrolling:

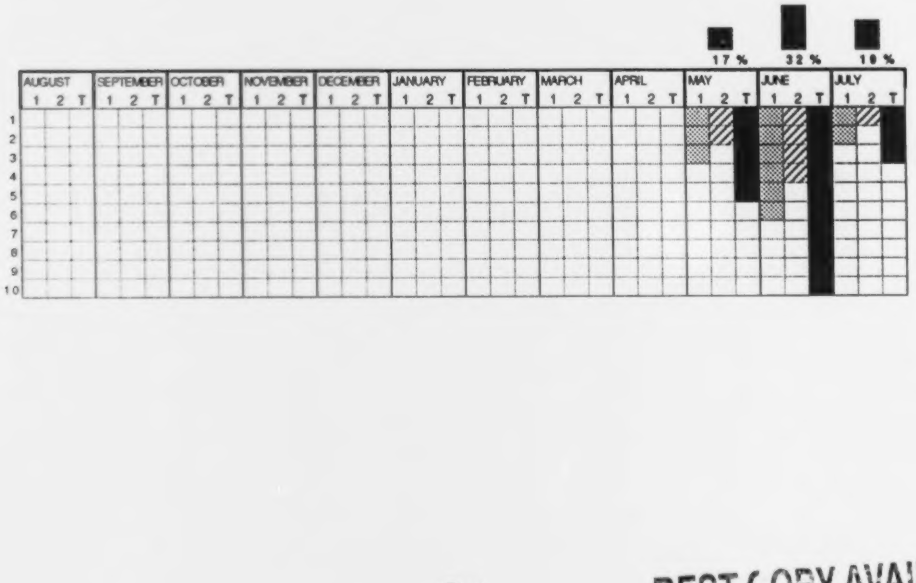


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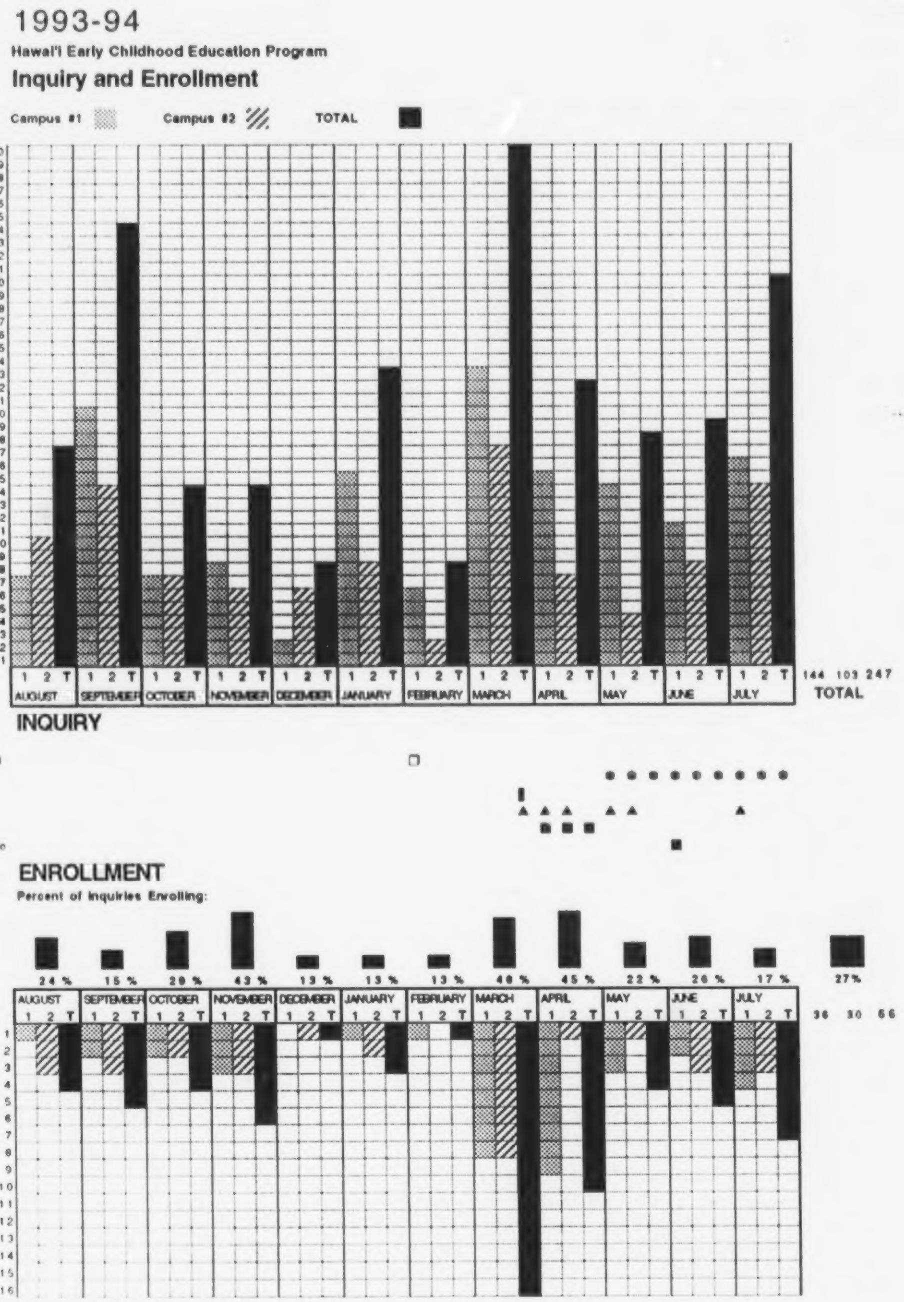
Figure 4



1993-94
Hawai'i Early Childhood Education Program
Inquiry and Enrollment

Enrollment retention 1993-94

Table 1 documents the need to increase inquiries, and improve retention if we are to reach capacity enrollment and financial comfort.

The year 1993 started with a student body of 159 that included 59% returning students and 41% new. Of the previous year's enrollment in May, 70% of the students returned. At campus #1, which has 65% of our total enrollment, there are ten consecutive years of available program. At campus #2, there are four years. If we had full enrollment and kept every student until graduation, then 15% of our students would graduate each year, and we would retain 85% (.1 x .65 +.25 x .35 = .1525). Retaining 70% of our students into fall 1993 is actually doing well.

Total enrollment from spring to fall 1993 increased from 135 to 159, primarily due to the rapid expansion of the new site. This campus opened well below its capacity.

Beginning the year at 100% enrollment, the addition during the year of 31 students and the loss of 37, left us with a net enrollment of 96%. Of the total number of students enrolling during the year, we retained 81%. This means to retain one student we need to enroll 1.23 students (.81x = 1). The enrollment to inquiry ratio was 27%, so to enroll 1.23 students we need (.27x = 1.23) 4.57 inquiries, or 3.72 inquiries per one student enrolled.

To reach a capacity for 1994-95 of 164, from the September 1994 enrollment of 123, we would need 41 additional students, net. At 1993-94 enrollment to inquiry ratios and retention rates, this would require 153 inquiries. To reach capacity by January this would require a monthly inquiry rate of 31 per month, and a steady average of 27% enrolling.

Table 1

Hawai'i Early Childhood Program

Enrollment Retention 1993-94

	LAST YEAR May	Gain/ Loss #	%	September	Gain/ Loss #	%	January	Gain/ Loss #	%	May
CAMPUS #1										
TODDLER	12			14			13			16
PRESCHOOL	53			54			54			51
ELEMENTARY	34			41			37			35
	99	10	10%	109	-5	-4.59%	104	-2	-1.92%	102
CAMPUS #2										
TODDLER	12			16			16			18
PRESCHOOL	24			34			35			33
	36	14	39%	50	1	2.00%	51	0	0.00%	51
NET TOTAL	135	24	18%	159	-4	-2.52%	155	-2	-1.29%	153
Net Retention	70% Last Year to New Year									96%
RETURNING	94		59% of September							
Gain		65	41% of September		11			20		31
GROSS ENROLLMENT				159			170			190
Loss	-41				-15			-22		-37
GROSS RETENTION				100%			91% September to January			81% ...to May

Dropout causes

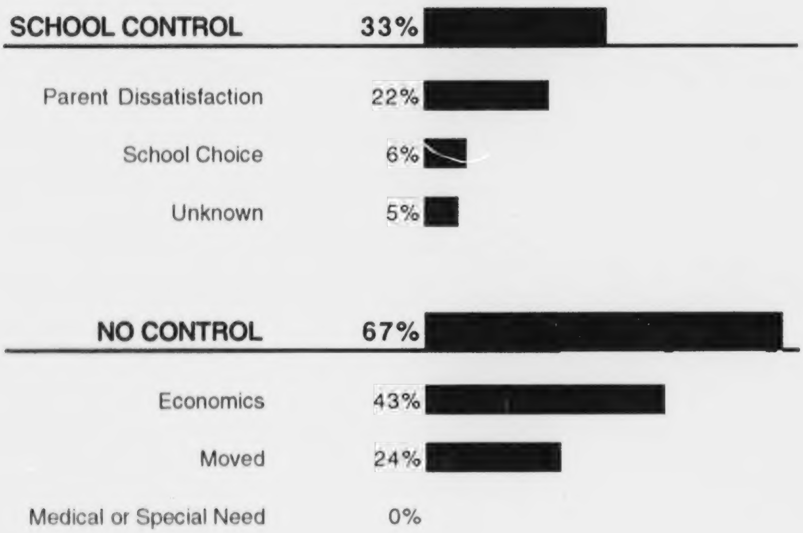
The school has an opportunity to change the dropout rate. Dropout causes are classed into those that we have some control over (i.e. parent dissatisfaction and school choice dismissals) and causes over which we have little control (i.e. family and community economics, moving and children needing medical or unavailable special services). While we can reduce tuition to improve affordability, it is hardly able to cover fair wages for staff as it is, so this option is not being considered. However, we can improve parent satisfaction, and we can screen children better so that we disenroll fewer children.

In 1993-94, 67% of the students who dropped out, did so for reasons of economics or a family move (Figure 5). In Hawaii, most moves are for economic reasons, so these causes may overlap. Of the 33% who left for reasons that fall within the control of the school, 22% were not happy with the program. Program dissatisfaction includes unhappiness with either teachers, facilities, other student behavior, program hours, curriculum or structure.

The data in Figure 5 was collected from oral comments made to teachers and administrative staff by parents. We do not have a formal exit document to record this data.

Figure 5

1993-94 Dropout Causes



Marketing Tools

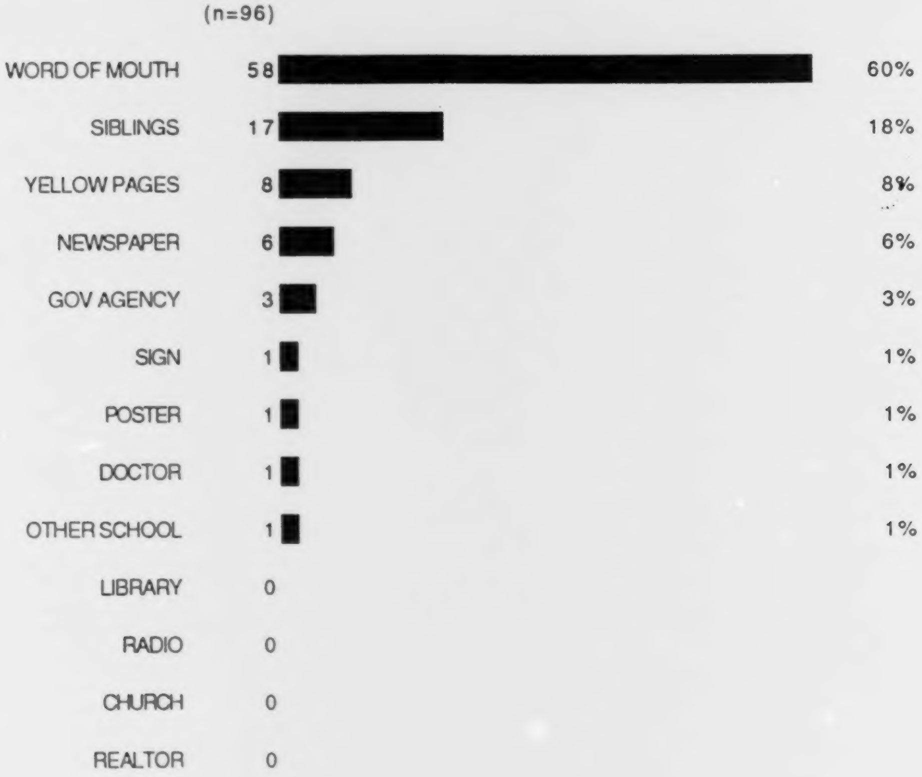
Two existing sources of information on the effectiveness of marketing tools were available in unlogged data: an open question on the application form asks for referral source; and, the record of those tools previously used and their impact on inquiries was in our account and publicity files.

The record of advertising was imposed on Figures 3 and 4. On these graphs, it is apparent that public exposure has an impact on the level of inquiries being made. However, because many tools have been used nearly simultaneously before and during bursts of inquiries, it is difficult to determine where the impact is coming from. There is also no way to determine from these graphs, how direct the connection is between exposure to advertising mediums and inquiry.

Figure 6 is a graph of parent responses to the open-ended question on the application form. Many parents do not fill this in, and nearly all only write in one answer. Clearly word of mouth is our strongest source of referral, which returns us to the importance of knowing, connecting and nurturing the students that we already have.

Figure 6

Hawai'i Early Childhood Education Program
1994-95 Referral Sources
From Applications



Parent Values and Priorities

We have no documentation on our parents priorities, concerns and values. It has been several years since we did any kind of parent questionnaire on our programs, and the responses were not tabulated or recorded. The tool used was not very satisfactory, and did not give us useful information. Creating a tool to research and document customer values and satisfaction would be a major piece of practicum work.

Analysis of the Problem: Factors contributing to the Low Enrollment and Fiscal Shortfall

A combination of factors created a financial deficit that operating funds could not manage; rapid expansion, demographic and economic trends, new "free" competition, changing state support policies, board strength, and the lack of a customer based marketing plan, all had a negative impact on cash flow.

Rapid Expansion

The school has grown rapidly and steadily since its founding in 1980. Beginning with 12 preschool children in 1/2 day and school length day programs, the school enrollment and program options expanded. In 1982 the school added an elementary school campus, and in 1986 program availability was extended from 7:30 A.M. to 5:00 P.M. to better serve the working parents.

The year, 1987, saw the addition of a toddler program. In 1990 a year round care option was added, serving working parents for all but 11 work days each year. In 1992 a second toddler and preschool program in another community, 45 minutes distant, was added in a low income housing project with a commitment to serve 51% low income children. With the exception of 1981, capacity has consistently run ahead of enrollment, indicating an aggressive, and potentially risky, growth policy.

In 1993-94, the school served 153 children: 34 toddlers, 84 preschool and 35 elementary children from first through sixth grade. We anticipated enrollment growing to about 180 children in 1994-95, as the new campus moved toward full capacity, with the addition of a federal Housing and Urban Development (HUD) funded classroom. However, at the new campus toddler enrollment dropped by 33%, and preschool enrollment stabilized at a level below optimum operating efficiency. Enrollment at the older campus was down in every program.

Expansion costs had been paid from the operating budget, tuition revenues, parent fund-raising, grant writing and loans from the bank. A commitment to finance the expansion to a third campus in 1992 was withdrawn at the last minute. The school went ahead with the new campus to meet a community need, without a strong financial base or adequate alternative funding plan.

Economic Trends

National, State and local trends all force us to face the challenges of increasing teacher salaries and decreasing numbers of parents able to afford quality care. Increasing numbers of parents of young children are living in poverty (Casey, 1993; Governor's Office of Children and Youth [OCY]: Hawai'i

Kids Count, 1995). The basic costs of housing, transportation and food went up substantially during the 80's. Beginning in 1990, our community was in a recession, reducing jobs and decreasing parent income. Unemployment rose from 6.7% in September 1993 to 10.6% in September 1994 in Hawaii County (Department of Labor, Bureau of Statistics, 1995).

Most parents can not afford the cost of quality toddler or preschool care/ education. The median income for a family of four in Hawaii is about $32,000. After all basic necessities have been covered, this family has about $1,000 left to pay for childcare, entertainment and "all else" (OCY, 1990) The cost of our programs average $ 6,000 for toddlers, $4,500 for preschool children and $6,500 for elementary. The average family can not afford this cost. The Governor's Office of Children and Youth figures that ideally a family can not afford more than 10% of its gross income for childcare. This means a family must be earning at least $60,000/ year for toddler care for one child (OCY, 1990).

From 1985 to 1990, Hawaii had a strong economy. Low unemployment promoted competition for quality workers. People could start at McDonald's for over $6/hour, and waithelp in good restaurants could make an average of $10-15/ hour including tips. This made it challenging to find and keep trained early childhood professionals. Our salaries moved up over these years from an average of $5/hour for assistants and $8/hour for teachers, to $7/hour and $12/ hour respectively. We created a salary scale that rewards longevity, and now have several teachers making from $28,000 to $30,000 per year. Program quality improved as good teachers stayed for longer periods of time. However, since 1990, we have been in the difficult position of maintaining our quality staff without the support of strong full paying enrollment.

Demographic Trends

Several demographic trends impact our program: increasing professionalization of early educators (Willer, 1990), increasing numbers of women in the workforce, the increasing economic polarization of our nation --- the haves have more, and the have-nots have less, increasing the number of children under six living in poverty to appalling levels (Casey, 1993; OCY, Hawai'i Kids Count, 1995).

There is an increasing public awareness that early caregivers are children's most important teachers. The National Association for the Education of Young Children (NAEYC) has made adequate salaries and professional training for preschool teachers and caregivers a primary focus (Willer, 1990). The State of Hawaii in its "Education Plan for the Year 2000," aims to provide universal care for 4 year olds at Department of Education staffing standards (Hawai'i State Department of Education, [DOE], 1988). This creates an external pressure to improve salaries, driven by our philosophical commitment to provide leadership and modeling in recognition of early childhood caregivers/ educators as professionals deserving a worthy wage.

Hawaii has been a part of the trend toward polarization in our culture. The strong market in Japan during the late 80's brought Japanese investors to Hawaii. The cost of homes was pushed up extremely high. By 1990, it was almost impossible to find any kind of home in our small community for under $200,000. The average home cost in our district is over $350,000. Our community also serves a resort coastline with many prestigious hotels which need a substantial workforce. The workers for the hotels need childcare, but basic living costs require two income families, and still little remains for quality care.

Today, 30% of the children in our community under six with working parent(s) have care outside their homes, with nonrelatives, in unlicensed, unknown circumstances (OCY, 1990).

New "Free" Competition

The opening of a new public school in our district, has had an impact on our enrollment and consequent tuition revenues this year. When there is a free alternative with the perceived high quality of "newness," it challenges us to compete at a higher level. We lost 25% of our kindergarten and elementary students to this new public school. Defining our market niche to keep the parents that we have and to gain new ones, became critically important.

Most parents cannot afford the full cost of quality care/education and our school must choose to serve only an elite, or to find sources of additional funding. Our mission makes serving a diverse community an imperative; serving an elite would not be consistent with educating for the 21st century. Our school believes that children must be exposed to diversity early to learn to work constructively with difference and to understand synergy. We therefore need to cultivate a substantial customer pool of the elite who can afford our program, to support the rest, or seek outside sources for scholarship. Both these efforts depend on good marketing strategies, which have not been in place.

Changing State Policies

In an effort to streamline programs for needy families, the state has been establishing a system which allows for a single point of entry for multiple services. To make their job easier they decided to limit funds for child care to $325/ month, regardless of program type or length of day. This enables them to serve more children, though at a lower level of quality. This means that a working toddler parent can only afford a half day of quality care. Either they get pushed out into the child care underground where quality is unknown, or someone else has to help cover the cost of quality care.

This policy change was made in fall 1993, after we made a commitment to serve 51% low income children at our new site. The school faced the choice in fall 1993 of disenrolling children in the program who had been receiving full support, cutting back their program to 1/2 day, or allowing them to remain and swallowing the cost. We did a little of each, and still ran an operating deficit.

The State has also been moving toward increasing quality in its licensing standards for group child care centers. The new 1992 state standards for licensing infant and toddler programs reduced group size to 12 and the teacher: child ratio to 1:3 for infants and 1:6 for toddlers. While we have always met these higher standards, the pressure on other centers to increase the training levels of their staff has increased the demand for well trained providers, pushing salaries up.

A short-term or long-term plan to fund the cost of supporting this high percentage of low income children at the lower state rates was not in place.

Board Strength

Our board is mostly parents of young children with a commitment to our vision, and a limited amount of time to contribute to developing the organization. Before embarking on major fund development, we must have a base of connection to people of wealth and influence in the community (Lord, 1988). It is challenging to get board members who have strong assets, including ones who can afford to model a solid financial commitment to our school. We are in a small community with two private elementary schools. Our competitor is a long established and prestigious school. While we have prestige at the toddler and preschool level, many of our parents with money transfer to the other school at elementary level. This trend is gradually changing, and more of our students continue into elementary. In either event, our board has come primarily from our parent body, who are generally young, and at the beginning of careers. They have less time, energy and financial resources with which to give substantial support to the school.

A community professional fund-raiser recommended that we cultivate our alumni base for stronger board support. We have been in existence now for 15 years, so some of our early parent supporters have children moving on to college. These parents are at a career level that may support both greater financial contributions and a higher level of power networking in the community. The school currently maintains no contact with alumni.

Lack of a Strong Marketing Plan

The school tends to have a very tight budget, and minimal human resources. Marketing expenses were cut before direct program needs. A very small administrative staff got caught up in the daily agenda. Marketing was done without a well thought out campaign, and designated resources.

From 1987 to 1995 we made significant improvements in the retention of quality staff, which has indirectly served to improve our public image, and to market our program.

Cultural Context for Our Cash Flow Problem

Our school's dilemma is not unique. The American culture does not value children highly, prefers short term gain or savings to long term investment, and does not recognize the components of quality care or their importance to a child's development and well-being (Bredekamp, 1992). Americans talk about how important children are, but do not put public resources behind the talk to make it real.

It has been less than 100 years since women were considered chattel, and we are just beginning to make the shifts that will recognize children as humans with separate needs and human rights, rather than the property of their parents. This property perspective is reflected in our reluctance to commit community resources to children; they "belong" to individuals. We value independence, both personally and for the family. Unlike the African proverb, we do not consider that "it takes a whole village to raise a child;" we consider child raising the private province of the parent.

As the cost of care/education moves up to reflect the true costs of quality — limiting family income to one earner, living wages for caregivers, adequate numbers of trained personnel for limited size groups of children —— the cost of care must go up. Who is going to pay for the full cost of quality? Parents can not do it alone. Our nation does not have a "strategic plan" for providing quality beginnings for the next generation. Neither does the State of Hawai'i. The community is beginning to acknowledge the problem, and to work on it, but solutions are at least a decade away (OCY, 1990; O'Donnell, 1991).

Recent headlines make it look like its news that birth to six is a key period in the formation of character and attitudes towards learning, living and community responsibility. Our general society is just beginning to recognize the need for thoughtful attention to the developmental needs of young children. Acknowledging the necessity of short term expenditure and the savings in prevention is still in the future. Our culture tends towards short term fixes rather than long term planning. We spend far more on remedial and crisis management than on prevention. (e.g. The United Way will not fund early "education," though it will fund agencies that deal with crisis management or remedial care for children. State and federal agencies support education for high risk children, yet there is minimal or nonexistent support for early childhood education as prevention for the children who do not begin life at high risk.)

Parents can not afford the cost of providing a quality beginning for their young children. Buying power has diminished, and the middle class has shrunk. Young parents are needing two incomes to sustain some semblance of their parents' life styles. As mothers move out into the work force, the need for childcare increases, but the incomes do not increase sufficiently to pay for the now necessary childcare. Our State Strategic Plan on Workforce Childcare, (1990) found that 10% of the workforce parents of infants, toddlers and preschoolers in our county have no childcare (trading back and forth between shifts, leaving the child with another older child, taking the child to work, or leaving them alone). Another 20% have care/ education outside their homes, with nonrelatives, in unlicensed, unknown circumstances (OCY 1990). This is a national trend (Casey, 1993).

Assets

The school has a talented and dedicated staff, many of whom have been with the school for over five years. We have been building communication skills through staff development programs, and have a solid and extended core of teachers who can address issues in creative and productive ways. The school was selected as one of 16 small businesses statewide to participate in a "Service Excellence Incubator Project," learning tools to accelerate continuous improvement. Participation in this program gives the school access to business consulting at a level, usually reserved to the province of business.

Lead faculty share a common philosophical foundation by virtue of their commitment and completion of an extensive Montessori training program. An understanding of Montessori philosophy and methods is an asset in constructing a corporate institution that is focused on continuous improvement. Faculty have been working to establish clear corporate values and operational definitions of implementation. There is a solid foundation on which to build a marketing and annual fund campaign.

CHAPTER III

Goals and Objectives

Goal:

Our goal is to have an effective marketing strategy and plan for 1994-96, based on a clear definition of our school's values, an understanding of our customers, a periodic assessment of customer satisfaction, and inquiry/ enrollment data. This strategy will increase awareness of our quality programs and generate increased support through enrollment and contributions of time and money. Community awareness and support will provide a foundation for launching our first successful annual fund campaign.

Only two of the factors that impact on our low enrollment and low cash flow lie within our present sphere of influence: board strength and marketing. Board strength can grow out of good marketing, but can not develop independent of a clear market niche and strategic plans; a marketing plan that will draw new customers, and keep the old ones, will also draw support to the school at every level. The board will grow stronger as we define our marketing niche more clearly and implement dynamic marketing strategies. A stronger board will build the foundation that we need for cultivating a pool of major donors.

The school operates at peak efficiency when we have full, wait-listed enrollment in every program. If we must maintain tuition revenues at 95% of our operating budget to sustain institutional viability (National Association of Independent Schools [NAIS], 1992), then we must know and serve our market well and keep the enrollment full to make this possible. With full enrollment and wait lists we can operate at optimum scales of efficiency. This means running at our desired student/teacher level, not below. Good marketing can create full enrollment.

The additional 5% "other revenue" will come easy, laying a foundation for the endowment and capital fund campaigns to come. A strong constituency of supportive parents, alumni and community could all contribute to our annual fund. If the basic requirement for an annual giving program is a strong support constituency (Connors, 1988), then effective marketing is a primary step to define, build and maintain this support.

A wealthy, wise and hard working board that are able to draw major donors into our program could grow out of this support base. We want them to feel they can soar on the wings of an organization that is clear, purposeful and powerful. Marketing tools can both bring in new board and can be the wind beneath the wings of those already serving. J. G. Lord says that to raise funds, we must be "more intentional, more organized and more strategic than we used to be. The focus is less on getting donations per se, and more on the development of donors and the development of institutions (1988, p.vii)." Institutional development must build strategically on a clear mission, vision and values (Bryson, 1989).

Lord argues that to get money from outside people, we must be "investment counselors, not salesmen." (1988). Emphasis shifts from sales to marketing an investment opportunity; our program must present itself clearly and dynamically. Again, this is a product of planned and strategic marketing. An effective strategic marketing plan is the foundation for long term institutional, constituency and donor development.

Objectives:

Increase inquiries by 20%.

Research inquiry and enrollment patterns from May 1993 to the present (a hardware/ software change point), and graph the results. Impose a record of marketing strategies, analyze , and use the data to increase inquiries and enrollment. This compilation will track the ratio of inquiries to enrollment, and the relationship of marketing strategy to inquiry volume.

Target our customer pool more effectively and increase the ratio of enrollment to inquiry by 20%.

Use data on customer priorities in advertising text. Use advertising tools that work best, based on data.

Determine the three or four most effective tools to reach prospective parents by recording, graphing and analyzing referral sources from September 1993 to the present from a question on the application forms which asks how parents heard about our school.

Develop a marketing survey which will also ask parents how they heard about our school. Compile, graph and analyze the data.

Eliminate the net loss of students during the year, using a control period from August through February, 1993-94, and 1994-95

Reduce the percentage of loss from 2.5% (1993-94) to 0% by January 1995. The strategies for improving retention will be: weekly newsletters home to parents from each class, and a parent education program scheduled and announced in August.

In the future strategies to meet and improve on this objective will include the use of a values match prior to enrollment, providing an opportunity for dialogue and education of both parent and school. Mismatches can then be reduced.

Determine the four to five key values of our faculty, of our customer pool, and whether these values match.

Reach consensus within the faculty, staff and board on a corporate values statement and convert this statement to a tool which can be used to analyze both parent and community value matching. Issue the tool, compile, graph and analyze the data from parents.

Determine the three to four key characteristics of quality education as perceived by our parents.

On the marketing survey, ask parents to check the school characteristics most important to them, and to evaluate this school. Compile and analyze this data, to determine which key areas of our program to promote in advertising.

CHAPTER IV

Solution Strategy

Review of Existing Programs and Approaches

Prior to this year, our approach to marketing included a wide range of piecemeal strategies, and informal feedback mechanisms. Strategies included advertising, publications, parent education programs, fund-raising events, public awareness activities, and infrequent formal questionnaires. No data was kept or analyzed formally.

Advertising

The school had no system for measuring the effectiveness of our advertising, nor an ongoing advertising campaign. A board member in business, said that the companies that survived the great depression, were those that continued to advertise regularly, even when resources were short, but we had allowed funding priorities to block this strategy. Advertisements were placed in the local paper, a local magazine, or community flyer when funds permitted. Response was not analyzed and no accurate measure taken of effectiveness. We placed an average of four 3 x 5 advertisements in the local paper, in March and July or August. Last year a radio spot ran daily for three months. In February, 1994, one advertisement was placed in a direct mail flyer that goes out to 5,000 boxholders in our community. We thought that there was a small increase in inquiries when we advertised, but we had no data compiled or analyzed from our records to confirm this assumption.

Publications

Publications is an area of strength. We are fortunate to have a very attractive and appealing logos. We used process blue and white for our colors which connotes peace, cleanliness, quality, purity and virtue. The natural and round form of the logos has positive and warm connotations. The symbol is a strong visual representation of our philosophy and values. A faintly serif type face has a contemporary child like appearance. This visual image matches our mission and is a continuing strength in our marketing program (MacPhee, Debruyn, 1987).

We respond to inquiries with an inquiry packet that includes our brochure, schedule of programs and costs, application forms for the office and teacher, and an outline of the admissions process. The brochure is attractive blue on white and professionally printed. The brochure has photographs throughout and a minimum of copy. It presents our programs concisely and effectively. Feedback is very positive on this initial presentation. No system of inquiry follow-up was in place..

On enrollment, parents receive an additional packet of information that includes our parent handbook, forms for emergency information, a parent volunteer sheet, health cards, a contract and their first bill. The parent handbook is quite thorough. This packet was sent out as loose materials in a manila envelope.

Parent newsletters went out infrequently or irregularly. Last year one teacher sent out a weekly newsletter and got very strong positive feedback from her parents. Other teachers were more or less regular with a monthly newsletter.

We have not yet published an annual report or periodicals aimed at our alumni and community supporters. An annual report and subsequent periodicals aimed at one's general support constituency were given as key components of a fund campaign at a two day workshop on development (NAIS, 1992). An annual report will be an important new task for the head of school.

Parent education programs

Parent education begins with a tour, observation, parent and child interviews. When parents submit their application or follow up on the inquiry materials, we set an observation or tour appointment. This tour is given by either the site director or head of school. Programs are explained at this time. An interview with the class teacher for both the parent and child is scheduled. We have had positive feedback on the tour and observation process from parents who go through it. More could be done to convince parents of the necessity of this step; some working parents do not want to take the time away from their job. The year begins with parent-teacher conferences. Two subsequent conferences follow in November and March. Parent education programs were sporadic and infrequent. Each classroom presented an orientation in September, a "Mom's Night," and "Dad's Night," in the Winter. Other parent education programs have been offered infrequently, without a planned schedule.

Fund-raising

Events

We sell Christmas Trees in December, and have a Family "Fun!Raiser" in April. These two events averaged $9,000 in revenue over from 1992 to 1994. The spring event included children's games, activities, a meal and silent auction.

The people who came were mostly from our own parent body and their friends. These are all parents of young children, and there was a general attitude of keeping the silent auction prices as low as possible.

I interviewed several key fund-raising people in our community. Ross Wilson is the President of Current Events, a public relations firm in Kailua-Kona, Hawaii. He donates his time each year to put on a fund-raiser for another local nonprofit that brings in about $50,000. While he gave me some specific advice on how to run an effective "Big Event," his key recommendation was to strengthen the caliber of board participation by looking for people in our alumni base. He noted that it is not possible to get donations that can pull in that kind of revenue without a board with connections to the wealthy community. He noted it is not possible to get key community people on the board without a well-defined mission, vision and values, and an effective marketing plan to generate support.

Annual fund

A simple request for donations about Christmas time was sent out mostly to parents and our very recent alumni. It had never brought in more than a few thousand dollars.

Our records of alumni are in student files in storage boxes. Some records from 1987 to 1992 are on an old PC clone computer, that is no longer used, and inaccessible from our current Apple Macintosh format. A functioning data base of alumni or potential community supporters did not exist.

Public Awareness Activities

Six press releases were published in 1993-94. The local paper ran each release, though they sometimes cut them substantially.

We participated in the "Aloha Festival" activities at our local park in October, and are represented in the Christmas parade most years.

Description of Solution Strategy

There are three key areas to our solution strategy: defining and developing resources, understanding our market and customer better, and creating marketing tools. We are using a process based on Deming's "Total Quality Management" theories (Deming, 1986).

Defining and Developing Resources

Internal

Our faculty, corporate culture, and program were our greatest resource. We had a strong common vision, and broadly defined short term and long term goals.

- We agreed that an important strategy would be creating internal clarity of purpose by reaching consensus around simple statements of mission, vision and values. This would define our market niche.

The school had taken first steps in this process. Board, faculty and parents had developed drafts of mission and vision. Several facilitated all day sessions would be spent working toward clear and simple statements of mission, vision and values.

- The next step would be to condense what we had into a simple marketable statement with power. A marketing team grew out of our service excellence incubator group to take these next steps in 1994-95. Head of school, site directors and interested board, parents and faculty would serve on this committee. Our "Service Excellence Incubator" consultants would assist. They were the Wyatt Company, and George Kanahele & Associates for the Pacific Region Institute for Service Excellence (PRISE), and the Department of Labor and Industrial Relations.

External

The two key areas of external resource targeted for development were alumni and major donors in the community. The board president and I interviewed the personal assistant to a very wealthy member of our community. We had solicited a substantial contribution ($5-15,000), and got $500. We asked if she could give us feedback on our approach and on our campaign. She was very gracious in giving us advice. She reiterated the need to have a substantial base of committed people, with a "passion for our mission." She suggested that we go first to our alumni base for this kind of commitment.

- Administration would create a data base of alumni and interested community. They are an untapped resource, that could move our vision forward. We use Filemaker Pro 2.1 (Claris, 1990) software for small data base projects.

We would study the prohibitively expensive fund-raising software ($30,000), "Raiser's Edge" (Blackbaud, 1995), and would select fields and design a useful data base in Filemaker Pro.

- My administrative assistant would enter pertinent data from our hard files of alumni, and previous school supporters.

- A list of potential support would build from networking resources. Administration would research new lists of potential support, including the membership of the Chamber of Commerce, Rotary Club, etc. We researched sources of mailing lists for purchase and would set aside a small amount of money to take advantage of them.

- The marketing team would identify the areas where we could solicit input on feasibility from potential donors. Lord identifies this as a key process in donor development (1988).

- An annual fund campaign strategy would be budgeted into time and resource calendars, supported by clear values, customer assessment, market survey results and an administrative assistant for development. .

At a NAIS workshop on Development in Honolulu (1992), they gave the following optimal calendar for an annual fund campaign:

September - Annual report acknowledging previous year's donors and highlighting accomplishments.

October - First request for contributions.

December - Second "End of tax year" request

January - Journal of school news

February/ March - Update on fund campaign and request or thank you

May - End of fund campaign request/ reminder

The foundation work in definition of vision, mission and values and market survey would be completed for this practicum in 1994-95. The annual fund will be another key focus area in 1995-96. We plan to follow the above calendar.

Understanding Our Market and Customers

Customer assessment and satisfaction were designated key change areas. Drawing and retaining customers can only be successfully accomplished when their values are matched, needs met, and they can feel good about the program.

The market

We are clearly in a market where it is important to go after potential customers; we do not have the luxury of sitting back to wait for them.

- In September 1994, we would begin sending a list of inquiries to each site director or program head each Friday. They would follow up with a call to set an observation time, or to answer any questions the potential parent might have. They would also begin surveying causes for lack of further interest in our programs. Create a system so that this could happen consistently and efficiently.

- Find out what is most attractive to potential customers. Turn drafted statements of key values into a questionnaire format. Complete this questionnaire, and arrange to try it out on a selected group of committed parents, and parents who left us both happily and unhappily.

- Conduct a larger survey of our whole parent body, as many of our alumni as possible, and a selection of the community at large.

- Find ways to connect with those customers whose values are most consistent with our own.

- Keep accurate base line data on customer values and program assessments, to develop a better understanding of our potential customer's values. Knowing satisfied customers values and priorities could improve our advertising program. Advertising could be targeted more effectively (Byham, 1988).

- An annual advertising campaign for the year could maintain a consistent contact with our potential customers, and the campaign could be based on the key characteristics that the customers valued.

- Analyze referral sources from application forms, so that marketing tools can be used most effectively.

The existing customer

It generally costs a business five times as much to replace a customer as it does to retain one (Montanari, 1993). It is important to reach the same level of clarity about what customers value that we reach with school values.

- The values match survey tool could give us a clear understanding of our customers values and priorities and how their values match ours.

- At August initial parent conferences, parents would be asked what they value most about our program and how they heard about us. The head teachers conduct these conferences. This would give us preliminary information for choosing the most effective marketing tools.

- Weekly newsletters would be a key component of creating a strong-bond between home and school. Newsletters were chosen by staff as a key change area. All head teachers committed to contributing weekly news. Allocate human resources in the form of an administrative assistant for development to edit the weekly newsletter and assure that it gets out to everyone.

- Research and compile data on dropout rates and reasons, for 1993-94 and 1994-95.

- Site directors would make annual parent education plans. Publish a yearly parent/community education flyer to be sent to parents and community agencies serving families. Advertise in a timely way for these workshops and seminars.

Creating Marketing Tools

Using our clear mission, vision and values, we would create a catchy slogan and an advertising schedule and campaign. The campaign would have components that are aimed at potential parents, potential board members, and potential donors. The marketing team would work on this. The head facilitates this team with the assistance of a faculty member.

- Design an advertising campaign driven by our understanding of our customers' values and priorities.

- Add a professionally printed, glossy, two-color "peachy" folder to hold existing information for parents and to hold presentations to donors, etc.

- Develop presentation materials to enroll potential board, donors and community supporters.

- Design a first request for donations for a direct mail beginning to an annual fund campaign. Use the data base from surveys for a targeted mailing and keep track of results. The mail merge in the data base would enable us to send out prompt thankyous and to avoid making duplicate requests of donors.

- Present donor materials to a small sample of potential donors for their feedback on the materials as well as content. Ask the lead personnel at two of the trust companies with whom we have established a relationship for their feedback. Ask two individuals who have made major donations to other institutions, and who have expressed some interest in our programs.

- Make revisions as required.

- Use these materials as a key component in our first "annual report" which will commence our annual fund strategy for 1995-96.

- Begin a series of small informal teas or lunches to present our materials to potential supporters.

- Develop a special relationship with the local paper to encourage better coverage for our programs. A specific objective would be to take the marketing packet that we develop to the editor and publisher of our local paper to enroll their support for our goals.

Evaluation

Data recording would be done on both existing and new systems. Data would be collected on inquiries, referral sources, advertising tools used, enrollment, dropouts, corporate and parent values, educational priorities, and program assessment.

- A "Word" (Microsoft, 1991) data base is used to enter inquiry information, including the inquiry date. This program is used to send out mail merge responses to inquiries. A new column would be added to track enrollment. For the past records, the subsequently enrolling people would be manually scanned and marked. In the future, when a child is enrolled, the name would be checked under "enrolled" on the inquiry data base to make data tracking, sorting and follow-up easier. This data would be sorted by month, compiled and graphed to show the ratio of inquiry to enrollment and the impact of marketing tools. In 1995-96, inquiry data would be converted to "Filemaker Pro, 2.1," (Claris, 1994) to be integrated with current student files.

• Application forms coming into the office for enrollment, include a question about how parents heard of our school. Administrative staff would go back through the applications for the past year and tally responses. The tally sheet would include: word of mouth, sign, poster, radio, siblings attended, doctor, yellow pages, government agency, newspaper, church, local employer, Realtor, other. The results would be graphed.

• Records would be researched on the tools used to market our program since May 1993 (the first inquiry/ enrollment data we have on our current software). This information would be imposed on the graph of inquiries and enrollment.

• Our student and tuition data is kept on a customized version of "Filemaker Pro, 2.1" (Claris, 1994). Student files include date of enrollment, and dropouts. The files would be sorted by program and month, and data summarized. This data would be compiled for 1993-94, and 1994-95 (August through January). The data would be graphed.

• Data on dropout causes would be researched. The student files would be sorted for dropouts by program. Research would be done to ascertain the cause for departure --in house, to the extent possible, the remainder by phone. The categories would be: program dissatisfaction (general, teacher, facility, "academics"), economics, and moved out of area. The results would be graphed.

- A major piece of the practicum project would be the development of two new tools for assessing the market and customer satisfaction: a marketing survey and a values match form.

- The marketing survey would collect data about parent priorities for education, referral sources, and an evaluation of our program. A copy of the market survey is in the Appendix.

- The values match survey would assess the congruence of parent and school values.

All graphs would be made on "Excel 4.1," (Microsoft, 1992).

CHAPTER V

Strategy Employed - Action Taken and Results

Solution strategies fell into three basic categories: 1) developing and defining internal resources; 2) understanding our market and customer better; and 3) creating marketing tools. Strategies one and two are the foundation for strategy three. Developing and defining internal resources was substantially completed. Tools for understanding our market and customer better were developed, and we completed surveys of our parent body. Next, the survey will be sent to alumni, and to a selected slice of the general population. There was inadequate time and money during the practicum period to complete the external community survey. A selection of marketing tools were implemented and their impact analyzed.

Developing and Defining Internal Resources

This practicum project began with an old vision and mission statement. These were revisited, revised and clarified. The bulk of effort went toward defining the school's values, reaching consensus, and translating them into a tool that could be used to evaluate a values match with prospective members of our school community. The work was done at full faculty retreats, staff, board, and marketing team meetings. In between group meetings the head of school formatted, made revisions and reissued drafts, based on the groups' work. The process used to review and create fresh mission and vision statements included large group groundwork, small group refinement, written drafts for individual review, and whole group conclusions.

Mission and Vision Statements

Process

#1. Half-day retreat. Board, faculty, a few parents.

INTRODUCTION

Short review discussion on our purpose for reviewing mission and vision.

Question posed to group : What do we want our school to be? What characteristics are most important to us in five general categories? -- facility, people, resources, culture, and processes. The meaning of these terms was briefly discussed. A large sheet of easel paper was titled and posted on the wall for each heading. There was plenty of room in front of each paper for several people to work.

SILENT BRAINSTORMING

Participants had pads of 3 x 5 “post-it” notes and large markers. During a ten minute silent session, participants posted adjectives describing their vision of the ideal school in each of the categories. This is an excellent strategy for getting a maximum number of ideas out in a minimum of time.

SMALL GROUP ORGANIZING

Participants chose a category, and small groups moved the “post-it” notes around to classify and organize the information. Groups could add lines, structure, headings with markers.

PRESENTATION TO THE LARGE GROUP

A representative of each group presented the results of the classification, prioritizing and organization to the whole group. An opportunity was given for questions, clarification and revisions.

#2. Written drafts of a mission and general and specific vision statements were prepared by the head of school, and presented to participants for review on individual time.

#3. Half-day retreat- general mission and vision statements were refined.

SMALL GROUP REVIEW

Small groups reviewed a section for accuracy, wording. Suggestions were made for additions, clarifications, revisions.

PRESENTATION TO THE LARGE GROUP

A representative of each group presented their final product to the whole group. Further opportunity for additions, clarification, rewording.

CONSENSUS VOTE

Each participant had an opportunity to vote, and discussions were continued until everyone could agree. Please see the consensus tool in Appendix A (p.101).

#4-6. Half-day retreat- specific vision statements (with planning for a new campus in mind)

Same process as in #1,2, and 3. General categories: School complex, toddler, preschool and elementary classrooms, play-yard.

#7 Final Product submitted to faculty, board and parents for individual final review.

Mission statement

We are educating for the 21st century by providing nurturing, prepared environments where children, parents, and staff joyfully develop their esteem, discipline, independence, motivation, and community responsibilities to their fullest potential.

Vision statement

We are a model of education for the 21st century, sharing a commitment to continuously improving, learner-centered education that celebrates diversity and life. A deep commitment to honoring each individual's optimum developmental path is reflected in learning activities in every area of intelligence -- language, mathematical, spatial, musical, interpersonal, intrapersonal, and kinesthetic (Gardner, 1983; Armstrong, 1987), and in an evolving curriculum that is accessible to every learning style -- auditory, kinesthetic, visual, and digital-auditory. Our classroom communities model diversity, respect for the individual and the group. Our education is democratic, experiential, humanistic, and holistic. We are living in the present in our programs.

The specific characteristics of our visionary prepared environment are:

SCHOOL COMPLEX:

- Village character
- Homelike buildings
- Scaled for children
- Hawaiian heritage look
- Ecologically respectful construction/ operation

- Maximizes maintaining the natural character of the site
- Community interface and accessibility:
    - Interrelationship;
    - School as microcosm, part of whole community.
- Multi-age groupings
- Experiential "real life" learning
- Enriched "prepared environments"
- Generous space
- Opportunities for the "play" of light, structure and shadow
- Provision for support services

CLASSROOMS

- Full of natural light
- Enriched "Prepared Environments"
    - Learning opportunities for all intelligences & learning styles
- Indoor/outdoor
    - Clear visual line of sight over classroom, lanai and small yard space
    - Full wall with sliding doors (away from wind/rain side)
    - 8' covered lanai beyond sliding doors
    - Mini fenced yards beyond
    - Outdoor utility sink
- Mini-yards have space for:
    - Animals
    - Garden
    - Small climbing structure
    - Mini-trampoline
    - Tool and garden shed

Miscellaneous age appropriate gross motor equipment

- Restrooms in each classroom (toilets, sinks)
  (one each per 12 children, male/female for elementary)
- Mini child size kitchen sink/counter in each class
  (mini cooking facilities in elementary classes)
- Indoor additional utility sink at child's level with work counter
- Science centers in Elementary classes (sink, burners, counters)
- All windows at appropriate child height
  (i.e. - Infant/toddler near floor)
- Teacher floor to ceiling cupboard, with mid work counter
  (4' wide for preschool and toddler,
  8' wide for elementary, with doors on all cupboards)
- Visual and physical interest and variety
  Reading "loft"
  Partially enclosed "warm/ soft cubby" areas
  Play of light, substance and shadow

PLAY YARD:

(Assumption: for elaborate play equipment opportunities, or for full field sports, the children would walk to the community playground.)

- Fully fenced
- Accessible to the community
- Maximizes maintaining the natural character of the site:
  Long grass exploration area
  Physically challenging climbing activities incorporating
  natural elements
- Lawn area for games
- Bike path & "garage"

- Climbing challenges
- Opportunities to explore the natural environment:
    - Bird feeders
    - Bug Towns
    - Skink Cities
    - Butterfly Gardens
- Child size picnic tables
- Small hard surface area for basketball hoop/ ball game surface
- Tunnels
- Swings
- Fish Pond
- Pavilion: covered hard surface
- Fruit, flowering and shade trees

Next Steps:

How much space would be required?

Secure funding for design and planning.

Strategic, specific plans for getting funding.

Values Statement

Process

#1. Three hour evening faculty meeting with board invited.

INTRODUCTION/ PRESENTATION TO WHOLE GROUP

The "Rotary 4-way Test" model: Rotary International has a "4-Way Test" that members are asked to apply to everything that they think, say or do: "Is it the truth?, Is it fair to all concerned?, Will it build good will and better friendships?, Will it be beneficial to all concerned?" This is a good framework for looking at what we value most; in defining values, we are describing what is most important to us.

The group was asked to think of the basic questions they would want to ask of everything that the school thinks, says or does.

SILENT BRAINSTORM

Four large sheets of double width easel paper were placed on the walls around the room, with plenty of room for participants to walk in front of each. We used untitled sheets, asking participants to feel free to move post-its around as they worked. We anticipated some risk in proceeding with so little framework, but could not think of categories that would not restrict free thinking. It worked very well. This process is a powerful tool for accomplishing a lot with a large group in a short time.

#2-6. The remainder of the process followed the same format that was used for mission and vision. Moving between whole group, small group and individual review and revision until a final product was reached.

#7. Final Product with consensus:

Value Statement

ALOHA:

Will it create good feelings?

INNER GUIDE:

Does this build self trust and affirm the inner guide?

DEVELOPMENTALLY APPROPRIATE:

Are we meeting developmental needs for all intelligences, and providing for all learning styles?

WHOLE SYSTEM:

Have I taken into account the whole system?

KINA'OLE:

Excellence & Professionalism: Is this my best?

Converting the Value Statement to a Tool for Matching Values

Purpose

The marketing team first defined the purpose of the values match tool that we planned to develop. If the tool proved to be effective in matching values, we would include it with our application packets, encouraging parents to fill it out, and to bring it to their initial observation or conference. The tool would provide a vehicle for discussion around key areas of similarity and difference between the values of the school and those of parents. The tool was not to be a "test" for review and "acceptance" by the school. We believe that the clearer parent and school values can be, the happier each party can be with variance. We can certainly agree to disagree, or agree that another school option may be more appropriate. With clarity will come comfort and power to both parent and school.

The decision was made to have the tool include positive statements that reflect and clarify each of the values. We wanted our values to be clear to anyone taking the survey; the tool would not include "trick statements." The decision was made to use the tool this spring with an anonymous marketing survey and with the NAEYC accreditation survey.

Survey format

After completing the summary statement of values, we spent three, 3-hour all faculty meetings working on exploring applications of our values and seeking consensus on their meaning in specific situations. In between the all faculty meetings, a core group worked on wording, and the head of school formatted the effort.

Process

#1: BRAINSTORMING as many curriculum, school specific statements as we could for each value. (e.g. ALOHA: "Negative thoughts and words are not useful.)

#2: CREATE A VALUES MATCH FORMAT

We eliminated duplicates, grouped similar statements, and decided to use a scale from, (1) strongly agree, (2) agree, (3) partly agree/partly disagree, (4) disagree, (5) strongly disagree, (6) don't know/no opinion.

#3: TRIAL RUN

All faculty took the values match. Marketing committee members tabulated the results.

#4: SMALL GROUP WORK ON EACH SECTION

Small groups worked on any of the statements marked by faculty with other than a (1) strongly agree, or (2) agree.

#5: REVISION AND RESUBMISSION TO THE WHOLE STAFF.

Everyone took the survey again, and we worked as a whole group on revising any statements so that we could have consensus on each one. Consensus included a (1) or (2) rating.

#6: FINAL PRODUCT

Please see the appendix for a copy of the six page "Values Match" tool.

#7 THE SURVEY

As part of the NAEYC accreditation process we needed to send out a program assessment questionnaire to parents. Including our own marketing survey and the values match caused concern about overwhelming parents with this stack of paperwork, and we wanted to maximize participation. The parent association came up with the idea of attaching a double raffle ticket for a $100 tuition discount to each set of surveys to encourage participation. Parents would remove half the coupon and the other part, stapled to the set of surveys, would come back to the school. After the deadline, we drew a winner and included the number in the next weekly newsletter. Forty percent of parents turned in their surveys.

The parent organization did not follow up with an effective telephone tree for reminding parents, and spring break fell in between the release and collection of the survey. The 40% return rate could have been improved by correcting these errors and omissions.

#8 SURVEY COMPILATION, ANALYSIS

Wyatt Associates of Honolulu took the values returns, compiled and graphed the data for us. We were very fortunate to have this assistance. They had in place powerful software that converted the data quickly and simply into an extensive portfolio of useful information. Figure 7 is a summary of response from parents on the values match.

Completing the tool and implementing it was a major undertaking, under the pressure of a short practicum period. The results from Wyatt Company came back to us in late April and board, faculty and staff have not yet had an opportunity to review and respond with course correction plans. There is a high level of excitement and enthusiasm for exploring this body of information.

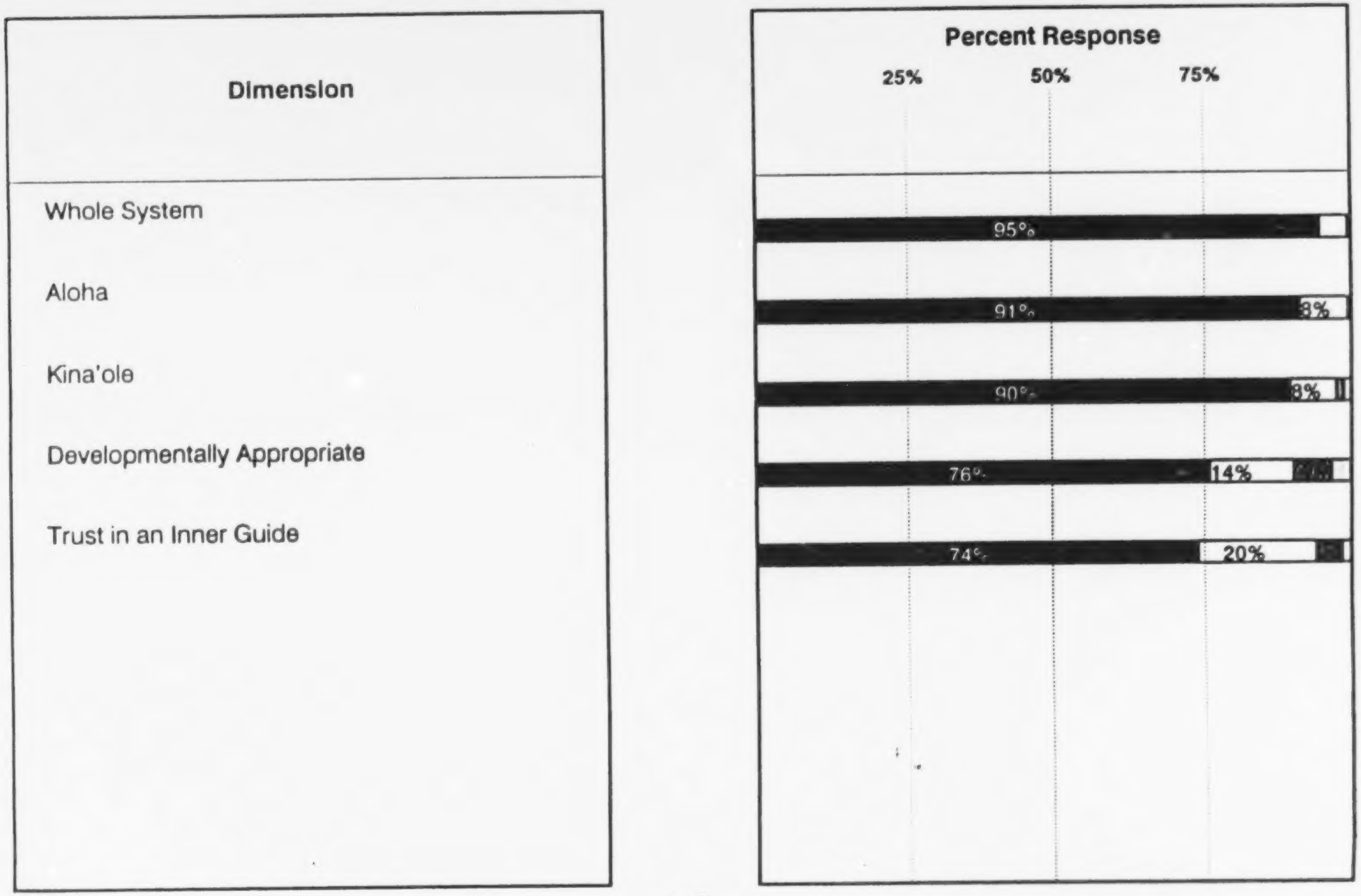
The summary report shows a high level of match between our values and those of the parents who responded. It may be that the parents most committed to the school are those who returned the survey and thus come closest to sharing our values. A higher level of participation, could give us more powerful clues to the reasons why people leave.

The summary variance does not come as a surprise. Our values regarding competition, punishment and reward, and the positive outcomes when you trust children to be assertive learners in a carefully prepared environment, are not mainstream. Although there is substantive research supporting our positions. (Chattin-McNichols, 1992; Kohn, 1986, 1993).

Figure 7

Hawaii Early Childhood Education Program
Values Survey

DIMENSION SUMMARY REPORT



Wyatt

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The values match will be sent out with all future application packets, with a note asking parents to bring the match to their first interview. The areas where they fall below "agree" will be opportunities for discussion about the distinguishing characteristics of our program. We hope that this will help sort out the people who will best benefit from our program, and increase retention.

Please see the appendix for the full report.

Asset Assessment

As a piece of strategic planning for marketing, we did an internal and external assessment of our strengths and weaknesses.

Internal

Self-Assessment.

A half-day retreat of board, faculty and parents. Using the easel paper, silent brainstorm, summary, presentation technique outlined previously, we defined strengths and weaknesses in each of the five categories used for developing a mission and vision: facility, people, resources, culture, processes. Each titled sheet of easel paper had a line down the center, creating columns for strengths and weaknesses.

The strengths defined through this process became part of the list of characteristics on the marketing survey. The main weakness fell in the area of corporate culture and having agreement on overriding values. This weakness was addressed with the work on a value statement, and value matching tool which we arrived at after much discussion around what the values "looked like, sounded like, felt like," in the classroom.

External Assessment

The head of school created a marketing survey tool. The faculty took the survey, made suggestions for revision. After revision the final survey was included with the HAEYC accreditation parent questionnaire, and the values match tool.

DESIRABLE SCHOOL CHARACTERISTICS

Figure 8 is a summary of school characteristics that parents prioritized. More than half of all participants marked warm and loving, clean and safe, fosters self-esteem, professionally trained staff, and happy children as the most important characteristics of a desirable school.

Figures 9, 10, and 11 are summaries by campus. In these reports Campus #1 is split into the toddler/ preschool program and the elementary program. Campus #2 which has only a toddler/ preschool program is separate.

Comparisons of the two toddler/ preschool campuses and the elementary campus offer interest. Only 50% of the elementary parents care that the caregivers are warm and loving, in contrast to 75% of both preschool campuses. A strong academic program moves into second place with 38% of respondents at the elementary level. This contrast was predictable, but it is nice to have hard data.

Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics

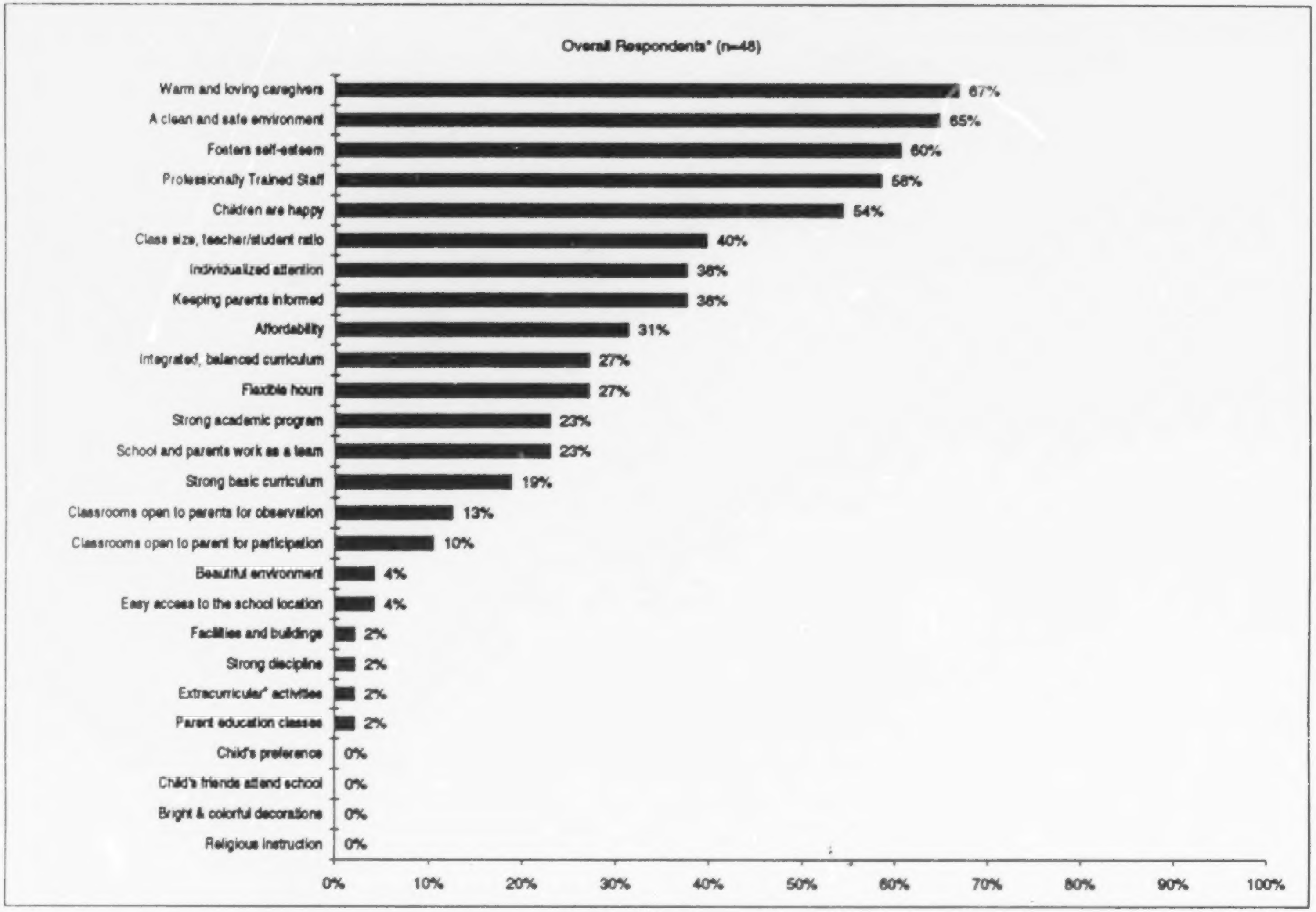

Figure 8

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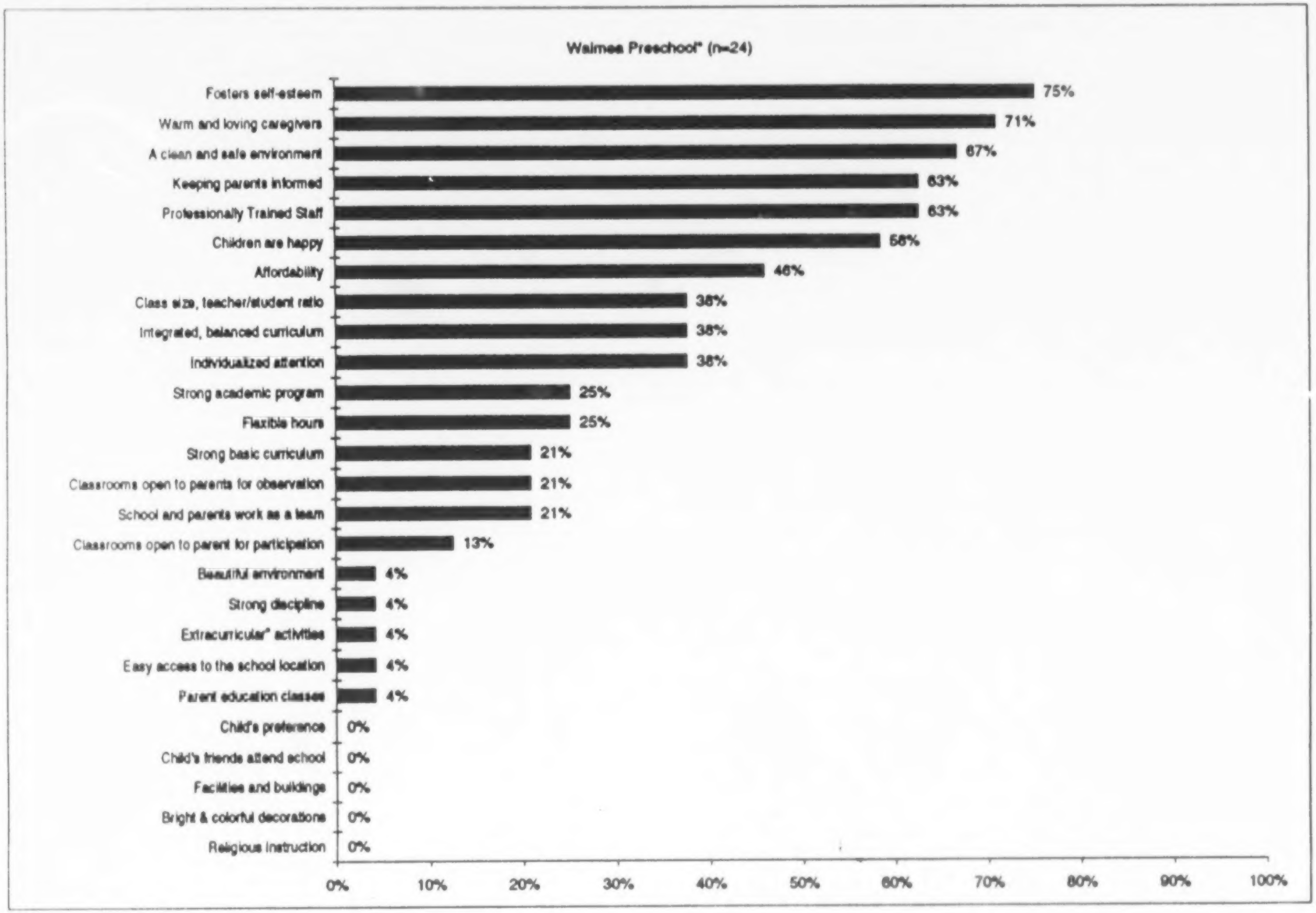
* % of respondents that checked items.

Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics

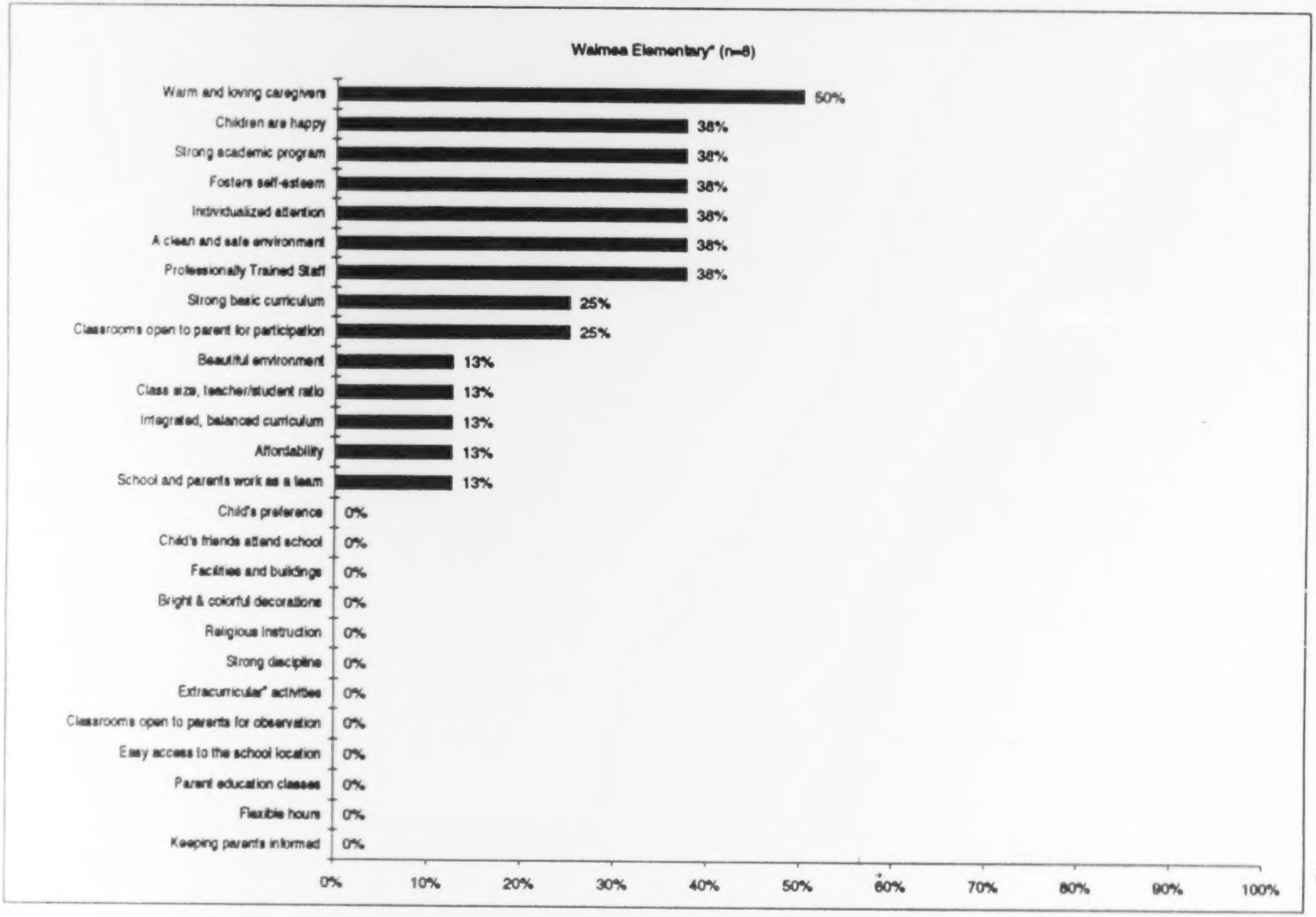


* % of respondents that checked items.

Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics

Figure 10



* % of respondents that checked items.

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Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics

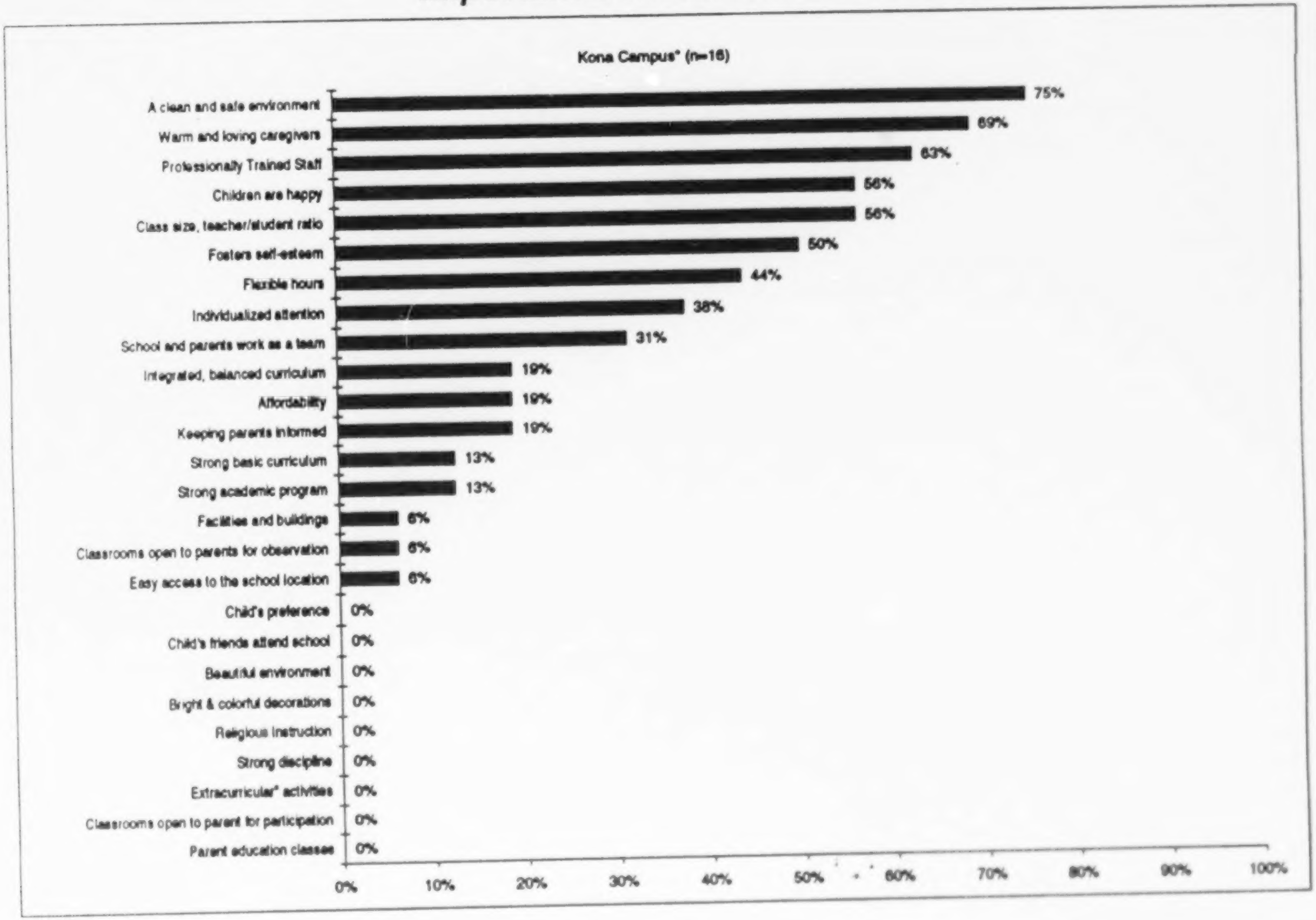

Figure 11

* % of respondents that checked items.

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ASSESSMENT OF THE SCHOOL

The Wyatt company prepared a full comparison report (Appendix E). The parents responding to the survey gave us generally high marks, especially in the areas that are priorities to them.

We got universally high marks, 100%, for warm and loving caregivers, the highest priority for our toddler and preschool parents (Appendix E, p.150).

Clean and safe (p.149) rated a 98% approval overall. Five percent of respondents at our oldest building gave us a less than satisfactory rating on this. While this is not a major condemnation, this is an area that deserves additional focus and resource assignment. The building is over 90 years old, and very difficult to maintain. We have a very minimal cleaning budget, and will need to look at prioritizing funds based on these parent priorities.

The overall parents' third priority, fostering self-esteem (p.155), rated a 98% over all. Both toddler and preschool programs gave it a 100% "better than satisfactory," or "great." Thirteen percent of the elementary parents "don't know." Paying attention to this indicator could be useful. Finding out how parents would know will be an important effort. Fostering self-esteem was tied for a place of second importance to these parents, and if they are not sure that our program achieves positive results, they will not stay with the program.

The fourth priority, professionally trained staff (p.149), again was rated highly at the toddler and preschool levels, but less so at the elementary. Thirteen percent (perhaps the same 13% above) rated us only satisfactory. Both our lead teachers have college degrees, Montessori credentials which represent at least another full year of study, and a minimum of three years experience. It will be useful to find out what reservations parents have about their training, and how they feel it could be improved.

Happy children (p.159) is the last priority mentioned by over half of all respondents. Overall, 5% said satisfactory, 23% better than satisfactory and 73%, great. Happiness is very subjective, so it is difficult to make direct efforts to change this statistic. However, it can be a base line from which we aim to improve by virtue of more specific efforts.

The areas that received more than 15% unfavorable or don't know responses were: affordability (39%, [p.151]), extracurricular activities (20% /10% don't know, [p.156]), strong discipline (7%/10%, [p.158]]), and religious instruction (12%/ 48% [p.158]). Affordability of course is a national issue, and part of the long term goals of this practicum effort. Creating a stronger marketing and retention plan will improve enrollment; the closer we are to capacity the more we operate at an optimum efficiency of scale. Opportunities to provide financial aid increase.

"Extracurricular activities" may simply need to be reworded or explained. Thirteen percent of the elementary parents were dissatisfied. Music, art and movement are considered part of the basic curriculum. A Japanese instructor is the only supplemental staff that we have. Exploring this inadequacy with parents could be useful. The preschool that has a gymnastics program and goes on at least one field trip per month, got the lowest rating from parents (12% unsatisfied), and at the new campus which rarely goes on field trips, and does not offer supplemental gymnastics, all the parents were at least satisfied.

Strong discipline rated overall 7% less than satisfactory. The phrase "strong discipline" may be confusing because it can have both positive and negative connotations. Exploring alternative phrasing may be helpful for next year. Certainly, "firm discipline" has a more positive sound. Constructive discipline is an important area in our parent education program, and we can continue to explore ways to reach parents.

To make this data more useful, the Wyatt Company can do a cross analysis. Are the people who value strong discipline the ones who are dissatisfied, or are they the people who do not have it highly rated. All of the people who marked strong discipline as a priority are at the older toddler/ preschool campus. We know we have a toddler parent who feels that if a child bites, the teacher should bite back and physically punish the offending toddler. Since we have explained our alternative approach and met with a fixed mind, this may be a source of the dissatisfaction.

The data offers a wealth of information. School will be closed on June 12th, so that all faculty, board and parents can meet to digest and respond to this information. The purpose of this retreat will be to review the data, and develop strategies that will improve customer satisfaction.

The full report is included in the appendix.

Creating Marketing Tools

Advertising

To determine which of the tools that we had previously used were effective, we compiled and graphed data on inquiries, enrollment, and the ratio of one to the other. We marketed the advertising used on the graph and analyzed its impact. See Figure 6.

Figures 3, 4, inquiry and enrollment data, show that advertising exposure in the community has impact. With enrollment at a low point in the fall, we did everything that we could afford. We decided to add 2-day and 3-day week options to help fill the program, beginning in January. In October and November we sent out postcards announcing the new program to everyone who had inquired within the past year and not enrolled. We put up posters announcing the new program as well as reminding the community of our full program options. The local radio station came to the school in early November to record our elementary students Thanksgiving messages. The radio ran these with an acknowledgment to the school for three weeks at no charge. In February, we purchased a space in a mailer that goes to 5,000 boxholders in the community.

There was insufficient data at the beginning of the practicum to design a customer based marketing plan. The information from the market survey that was designed, implemented and analyzed as part of the practicum project, was very similar to that on the application forms. Both point to focusing more energy on keeping the customers that we have, rather than on finding new ones.

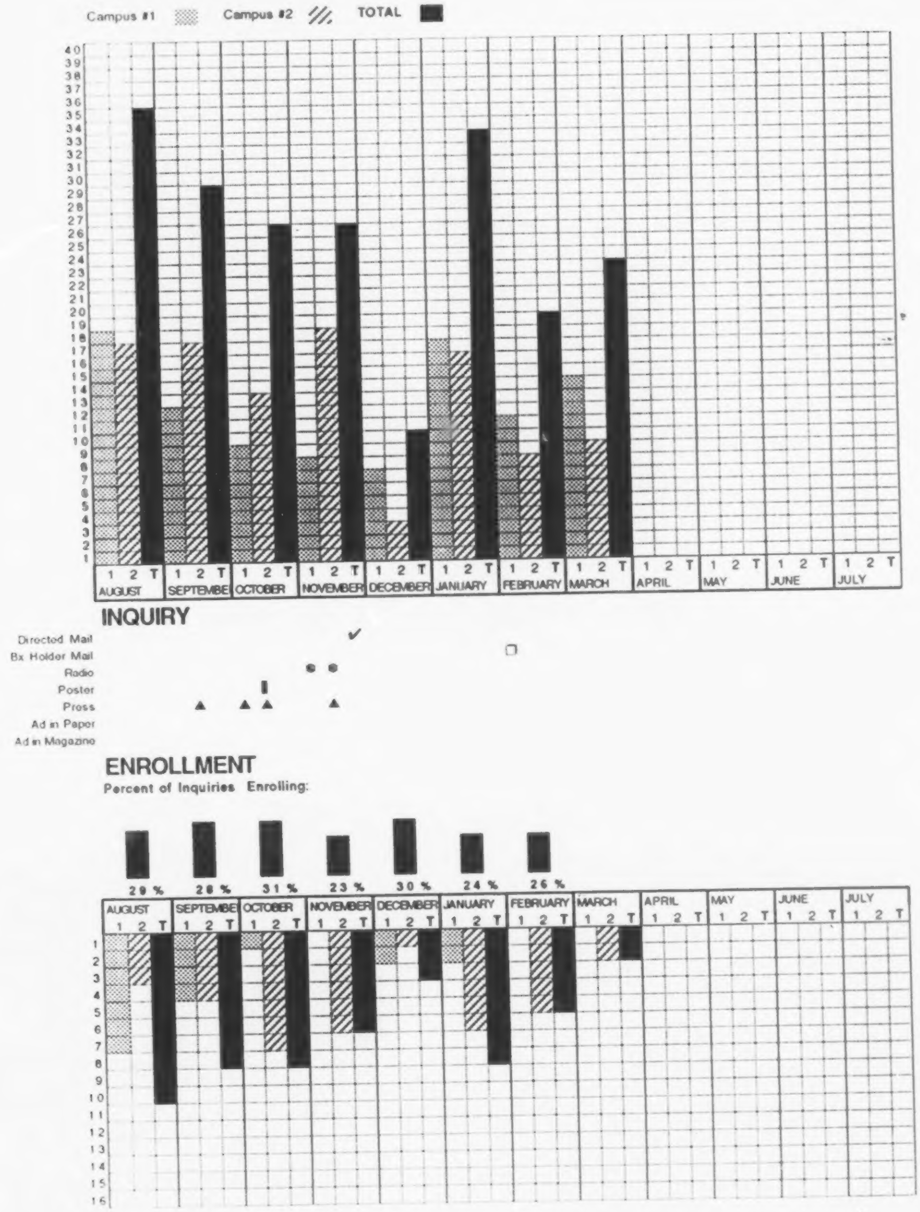
The inquiry and enrollment graph for this year (Figure 12) continues to show that press and advertising has an impact on the inquiry and enrollment level.

Figure 12

1994-95

Hawai'i Early Childhood Education Program

Inquiry and Enrollment



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MARKETING STRATEGIES

The market survey asks parents to check all the ways they heard about our school. Results were compiled and analyzed by the Wyatt Company. Figure 13 is a summary of the methods of gaining awareness of the school. Word of mouth is way out in front with 75% of the participants checking this method. The attendance of siblings was checked by 17% of respondents. This reinforces the need to focus on keeping our existing customers happy. The results are very similar to the survey we completed based on the open-ended question on our application form.

Signage, and the yellow pages were checked by 17% of the respondents. Newspaper (8%), posters (6%), Realtors (4%), and employers (2%) were the other methods checked. Interestingly, no one checked radio or government agency. We invested in radio advertising last spring and this certainly suggests the money could have been better spent. Jack Roose at the Wyatt Company did mention that radio and T.V. advertising can often be subconsciously effective and will not show up on surveys of this kind. Nearly 20% of our children, particularly at the low income site, come with government funding. The Department of Human Services says that they recommend our program, but this is not reflected in the data.

Hawai'i Early Childhood Education Program Marketing Survey

Methods of Gaining Awareness of School

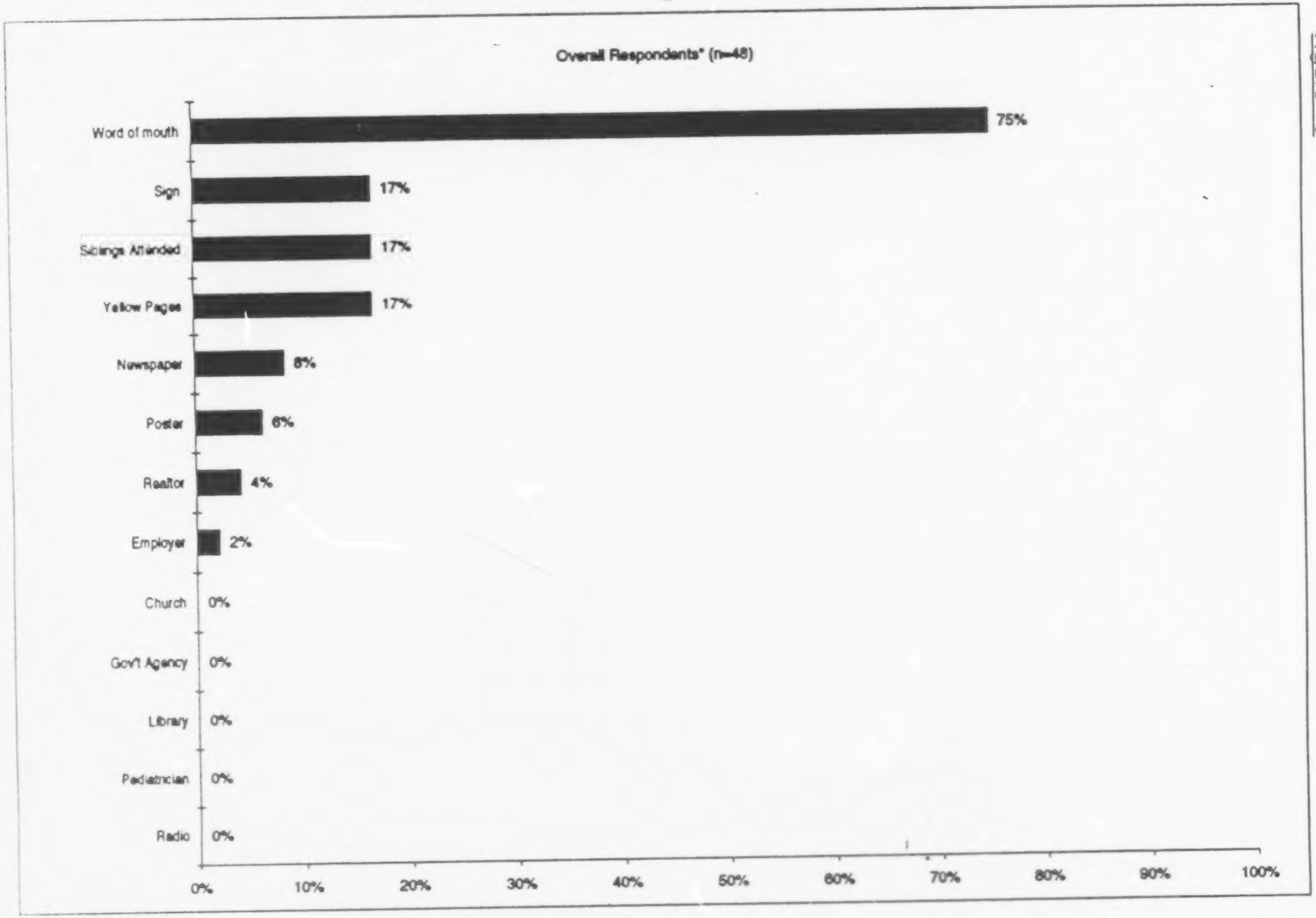


Figure 13

* % of respondents that checked items.

Publications

For fall 1994, we added a professionally printed, glossy, two-color "peachy" folder to hold the information that goes out to enrolling parents (parent handbook, forms for emergency information, a parent volunteer sheet, health cards and information, a contract and their first bill). Feedback from parents was very positive on this presentation; parents noted that the presentation connotes quality, and the information is well presented.

Parent Education programs

From informal surveys of parents last year, and tallies of parent complaints, it was apparent that parents wanted more information from the school. The faculty committed to weekly newsletters this year, with the intent to strengthen the bond between home and parent. This commitment was kept.

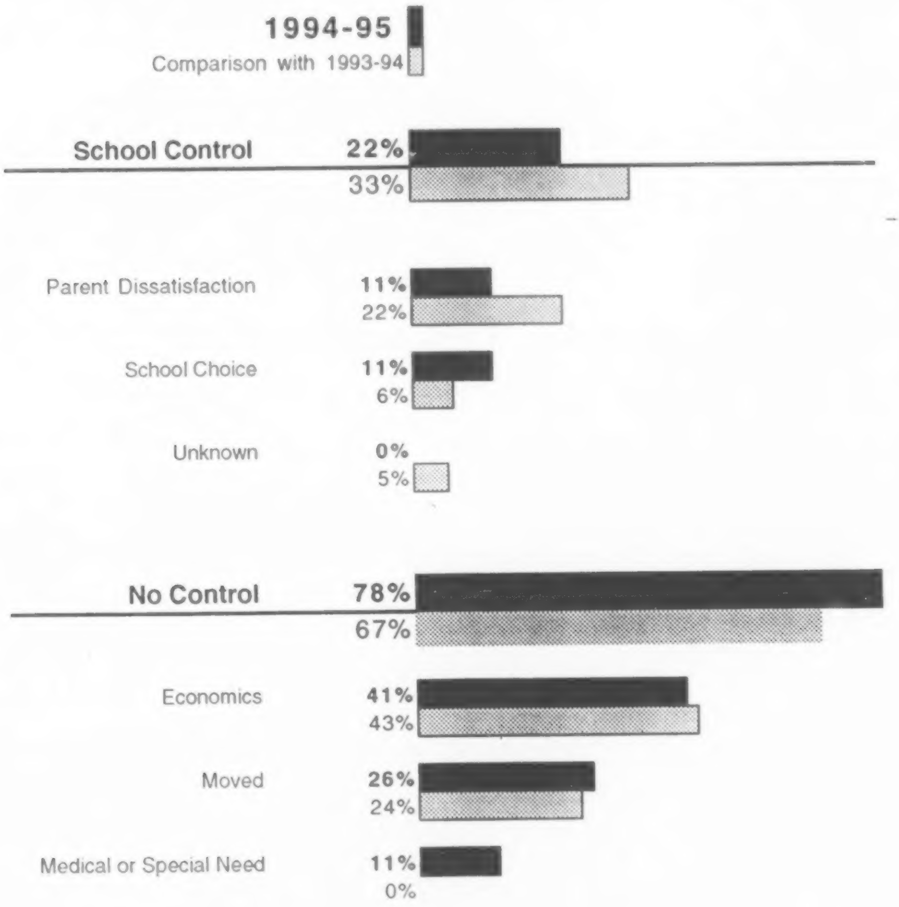
A schedule of parent and community education programs was published at the beginning of the year. We presented nine toddler care workshops, four workshops on communication and conflict resolution skills, four workshops on Montessori in the home and classroom, a two day personal health seminar, in addition to the traditional parent nights.

On the market survey (Appendix E, p.150), 7% of parents overall rated us below satisfactory on keeping parents informed, 12 % said satisfactory, and the rest better than satisfactory (32%) or great (49%). Unfortunately there is no comparable data from last year to gauge improvement. This seems much better. The number of complaints that the office has gotten this year for a failure to inform parents about events, has dropped to nil. It is too early to tell whether this strategy has had an impact on retention of parents already enrolled. We will be able to assess this in the summer by comparing reenrollment data for fall 1994 with that for fall 1995.

Figure 14

Hawai'i Early Childhood Education Program

Dropout Causes



Reducing dropouts is another benefit of making a positive connection with parents. This year dropout causes within our control dropped from 33% to 22% (Figure 14). This affirms improvement in both parent education and customer satisfaction.

A personal follow up on inquiries was another area of parent education that we planned to add. Lists of inquiries were sent to site directors every Friday. Unfortunately, the administrative time needed to accomplish this task was eliminated for fiscal reasons. Site directors followed up haphazardly, and did not keep records of their efforts. Hopefully, increased enrollment will provide funding to make this possible next year, parent volunteers can be enrolled.

Fund-raising

No significant changes were made in our fund-raising strategies for this year. Because of budget shortfall, we had to eliminate the position for an administrative assistant in development. This move precluded expanding our efforts in fund-raising.

The scholarship grants for next year went up from $15,700 to over $20,000 and we still have one funder to hear from. The improved data collection, and program focus, may have impressed the funders.

Fund-raising will be more effective next year, based on a better understanding of our customers and the effectiveness of marketing tools.

Public Awareness Activities

Press releases went to the local paper in September, October, November. Four were published during this time.

We had balloons made with the school logos and have taken them with a helium tank to several community events. We have distributed the balloons without cost to all the children.

Beginning in May, we are placing a small ad in the local paper to run weekly throughout the year.

The marketing team designed a bumper sticker. We are waiting for sufficient funds to implement this strategy.

We are applying for the Hawaii State Award of Excellence created by the Service Excellence Center, a partnership between the Chamber of Commerce of Hawaii and the State Department of Labor and Industrial Relations. This fall will be the first year that the State of Hawaii gives these awards. The data designed and compiled for this practicum will be an integral part of our application. Success in achieving this award will be a wonderful marketing tool, giving us broad exposure and acclaim. The award is noncompetitive; a certain level of points has to be accrued to reach one of three award levels. If we do not reach an award level this year, we will still receive comprehensive feedback from the reviewers which will be useful for the future.

Results

Objective #1: Increase inquires by 20%

Inquiries increased by 19%, from an average of 21 per month to an average of 25. See Figure 13.

Objective #2: Increase the ratio of enrollment to inquiry by 20%.

The average yearly ratio of enrollment to inquiry remained at 27%.

However, over the specific periods from August through February in 1993-94 and 1994-95, inquiries increased by 42%. We will need to complete the year for a full value comparison.

During the trial period, strategies had a significant impact on both the number of inquiries and the ratio of inquiry to enrollment. In 1993-94, from August through February there were a total of 118 inquiries, with 23 of these families subsequently enrolling. In 1994-95, during the same period, 178 inquiries were made, with 48 subsequent enrollments. This is an increase of 51% and 108% respectively. The ratio of inquiry to enrollment rose from an average of 19% to an average of 27% -- a 42% improvement over this five month time span. The March data has not been included, because enrollment often follows several months after inquiry, particularly for summer and next fall, and we did not want to skew the data.

Objective #3: Eliminate the net loss of students during the year.

(Control period August through February)

Table 2 is a retention report for 1994-95. The net loss was eliminated from September to January. From January to April, there was a net increase of 4.07%. The gross retention increased to 82%, a slight gain over 81% last year.

Objective #4: Determine the four to five key values of our faculty, and customer pool and analyze the match.

Five key faculty values were agreed upon by consensus. A tool was created to assess parents values. The data was compiled, graphed and analyzed (Appendix B and C).

Table 2

Hawai'i Early Childhood Education Program

Enrollment Retention 1994-95

	LAST YEAR	Gain/ Loss			Gain/ Loss			Gain/ Loss		YTD
	May	#	%	September	#	%	January	#	%	April
CAMPUS #1										
TODDLER	16			8			4			5
PRESCHOOL	51			42			42			43
ELEMENTARY	35			30			33			32
	102	-22	-22%	80	-1	-1.25%	79	1	1.27%	80
CAMPUS #2										
TODDLER	18			8			10			12
PRESCHOOL	33			35			34			36
	51	-8	-16%	43	1	2.33%	44	4	9.09%	48
NET TOTAL	**153**	**-30**	**-20%**	**123**	**0**	**0.00%**	**123**	**5**	**4.07%**	**128**
Net Retention	55%									104%
Last Year to New Year										
RETURNING	84		68% of September							
Gain		39	32% of September		9			25		34
GROSS ENROLLMENT				123			132			157
Loss	-69				-9			-20		-29
RETENTION				100%			93%			82%
							September to January			...to May

Objective #5: Determine the three to four key characteristics of quality education as perceived by our parents.

A marketing survey was developed and implemented within the parent body. The data was compiled, graphed and analyzed.

Financial considerations blocked extending the survey to alumni and to the general community. We did secure mailing lists a community organizations to use for the general community survey. We hope to have time and funding to follow through this summer. This data will enrich our understanding of the customer pool.

CHAPTER VI

Conclusion - Implications and Recommendations

The process of developing a marketing strategy for this early childhood education program in Hawaii, was as important as the product. The work on clarifying mission, vision and values enhanced faculty cohesion, problem solving and commitment. The marketing survey and values match improved parent partnership. The marketing tools increased inquiries, enrollment, the ratio of inquiry to enrollment, and retention. Enthusiasm for problem solving and change, increased with the focus on data compilation and analysis. The practicum project was a success.

Clarifying mission, vision and values was a much larger process than anticipated, and stretched over six of the eight months of practicum, not including some preliminary work done in the past. The work could have been completed within a ten week time frame overlapping a summer, though the longer time frame added depth. The work has run as a unifying thread through weekly staff meetings as well as the substantial blocks set aside for specific work; staff have been able to ask the basic "value questions" of new programs, of new curriculum or classroom strategy options. As these questions were asked, the values themselves came into sharper focus. The values provided a tool for keeping evaluations focused on the system and the problems, rather than on differences of opinion about individual behavior. Shifting problem solving attention from the individual to the issue, improved interfaculty relationships. Higher mood levels enhanced productivity, and reduced staff turnover. Last year, three new staff out of a total staff of 24 left, due to conflicts with supervising teachers. This year, one new staff member left for these reasons.

Both the weekly newsletters and parent surveys were well received by parents. Parents rated parent/school communications from satisfactory to great, 92% overall. While we have no data on previous years, we have a subjective sense that the complaints about missed or untimely information have been eliminated.

Inquiries, enrollment, and retention have all increased through marketing, permitting the school to achieve a sustainable operating budget. This was a year of severe economic challenge; Hawaii county is in the fourth year of a recession, compounded by an increase in unemployment. Reduced incomes pushed many people out of the preschool market and decreased enrollment in schools across the county. We did well against these odds; we reduced our dropout rate midyear from 2.5% to 0%, which may also substantiate an increase in parent satisfaction.

Radio, direct mail, posters and press releases all contributed to the increase in inquiries and enrollment. We thought that the addition of the 2-day and 3-day week programs would serve an additional customer pool and substantial improve enrollment. While the program has added three to six children at each campus, it has not been a big draw. Even though the fall publicity promoted this program, we must conclude that the promotion brought in more students, not the program.

Recording, compiling and maintaining base line data on inquiry, enrollment, referral source, parent values and perceptions was invaluable. Faculty shifted from assumption, presumption, and unfounded conjecture to a system for continuous improvement based on hard data. Faculty reported an enhanced sense of power and control in decision making, and an increase in enthusiasm for making changes. Hard data shifts the school to a laboratory model where participants can analyze the base-line, plan and implement strategies, and assess results within the frame of experimentation. This reduces the faultfinding inherent in power based decisions, and encourages continuous improvement. This pattern of problem solving has spread into other areas of operations: classes are using the format to analyze and improve their program; administration is using the process to improve the timeliness of tuition payments.

The school realized that a great deal of important information was already extant. Compilation was relatively simple and a worthy use of time.

Montessori education was founded on the concept of teacher as laboratory technician, carefully preparing a learning environment, connecting children to learning activities, catalyzing learning, observing, studying results and repeating the cycle (Montessori, 1975). Montessori training sometimes focuses on the rich curriculum to the detriment of this dynamic classroom process. The practicum work with data helped return to this philosophical core, and brought the fun back into making change.

The processes of clarifying mission, vision and values, and of using data to support problem solving will continue to be invaluable. Our program, faculty and parent-school partnership have all improved with this work, and a dynamic model for continuous improvement has been created.

Looking toward the future we know that 27% of inquiries are enrolling, 18% of those who enroll are dropping out during the year. We retain 55-70% of students from year to year. Our full capacity for 1995-96 is 164 students. Conservatively, if 55%, or 70 students return out of the enrollment of the current enrollment of 128, we need an additional 94 students to reach full capacity. To keep 94 spaces full, we must enroll a total of 116 students at the current drop out rate of 18%. At the current ratio of inquiry to enrollment, we must generate 430 inquiries to keep enrollment full. Over the four months from May through August, this would need to be an average of 107 inquiries per month. Over twelve months, an average of 36 inquiries per month is required. This is very useful information.

We have several options. We could increase the number of inquiries through marketing from averages of 21 (1993-94) and 25 (1994-95) to an average of 30 for 1995-96. We could increase the ratio of enrollment to inquiry from the average of 27% maintained from 1993-1995, to 30%. We could retain 70% of our students from May to September 1995. We could improve retention during the year by another 3 percentage points, to 85%. If we accomplished all three goals, the number of inquiries needed would drop to 368. This is a total improvement of 15%. Having this base line data will provide incentive for creative improvement strategies. Projections for next year can also be based on real and historical data, rather than subjective conjecture.

The practicum work has made a significant contribution to the corporate well-being of this institution -- fiscally, culturally and emotionally. Reflecting the values we derived:

ALOHA

Parents appreciated being asked and felt included. Faculty felt more creative with the systemic approach to problem solving founded on real data.

INNER GUIDE

Faculty looked to their wise selves within to develop the values statement. The group trusted that every member's perspective had value and worked through to consensus. Honoring each individual promoted self trust and validated each person's inner guide.

DEVELOPMENTALLY APPROPRIATE

We had typically functioned institutionally for the kinesthetic learner -- making adjustments "by the seat of our pants." The practicum work added dimensions and enriched the change process.

WHOLE SYSTEM

The focus on customer research and satisfaction brought in a major stakeholder that had not had a voice in institutional change. The process of data collection, compilation and analysis gave everyone tools for continuous system improvement.

KINA'OLE

This work brought out everyone's best, and is a constructive step toward achieving institutional excellence.

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AUTHOR IDENTIFICATION NOTES

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APPENDIX A

Consensus Tool

LEVELS OF CONSENSUS

1

I can say an unqualified "yes" to the decision. I am satisfied that the decision is an expression of the wisdom of the group.

2

I find the decision perfectly acceptable.

3

I can live with the decision; I'm not especially enthusiastic about it.

4

I feel we have no clear sense of unity in the group. We need to do more work before a consensus can be reached.

5

I do not fully agree with the decision and need to register my view about it. However, I do not choose to block the decision. I am willing to support the decision because I trust the wisdom of the group.

6

I do not agree with the decision and feel the need to stand in the way of this decision being accepted.

APPENDIX B

Values Match Tool

OUR VALUES

ALOHA

Will it create good feelings?

INNER GUIDE

Does this build self trust and affirm the inner guide?

DEVELOPMENTALLY APPROPRIATE

Are we meeting developmental needs for all intelligences, and providing for all learning styles?

WHOLE SYSTEM

Have I taken into account the whole system?

KINA'OLE

Excellence & Professionalism:
Is this my best?

VALUES MATCH

Please read each statement or question carefully and then circle the number of the choice that best describes your opinion. Write any comments you would like to make in the space below the question.

ALOHA **Creating Good Feelings**	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion
◗ Children and adults do their best when they are in a good mood and physically healthy. Comments:	1	2	3	4	5	6
◗ Negative thoughts and words are not useful. Comments:	1	2	3	4	5	6
◗ Learning should always be fun and joyful. Deep concentration is a form of joy. Comments:	1	2	3	4	5	6
◗ I believe in finding alternatives to physical punishment. Comments:	1	2	3	4	5	6
◗ Children and adults learn best when they build upon successes. Comments:	1	2	3	4	5	6
◗ Parents should give children the same respect they would give an adult. Comments:	1	2	3	4	5	6
◗ Finding fault is not useful. Comments:	1	2	3	4	5	6
◗ Children and adults must feel emotionally safe before they can meet challenges. Comments:	1	2	3	4	5	6
◗ Children and adults need to know that mistakes are opportunities for learning. Comments:	1	2	3	4	5	6

TRUST IN AN INNER GUIDE

"The Spiritual Embryo"

	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion
◗ Children can successfully learn to choose their own learning activities. Comments:	1	2	3	4	5	6
◗ Children learn best in a noncompetitive environment. Comments:	1	2	3	4	5	6
◗ Student interest is a good indicator of readiness to learn. Comments:	1	2	3	4	5	6
◗ It is OK for a child to ignore curriculum areas like math for even weeks at a time, when they are demonstrating focus in other areas. Comments:	1	2	3	4	5	6
◗ We can trust that there is a natural drive toward learning and growth. Comments:	1	2	3	4	5	6
◗ It is important for children to learn to be independent and self-sufficient. Comments:	1	2	3	4	5	6
◗ It is important for children to develop a conscious will to make appropriate choices. Comments:	1	2	3	4	5	6
◗ It is important for children to have free choice of work, so that teachers can build on their interests. Comments:	1	2	3	4	5	6
◗ It is important for children to learn to honor boundaries and to respectfully question authority. Comments:	1	2	3	4	5	6
◗ Competition is not necessary for optimum improvement. Comments:	1	2	3	4	5	6
◗ Schools should not reward and punish. Comments:	1	2	3	4	5	6

DEVELOPMENTALLY APPROPRIATE **All Intelligences, Learning Styles**	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion
◗ Math, language, music, physical education, personal relations, psychological development and spatial awareness are all equally important in a curriculum. Comments:	1	2	3	4	5	6
◗ Every child has their own developmental time clock and unique times when they are best able to learn different things. Comments:	1	2	3	4	5	6
◗ Knowing that each child learns differently is important, Comments:	1	2	3	4	5	6
◗ Children must be developmentally ready before they are asked to learn to read. Comments:	1	2	3	4	5	6
◗ Teachers are responsible for assessing mastery at each stage before moving the child on. Comments:	1	2	3	4	5	6
◗ Competencies are more important than grade level norms. Comments:	1	2	3	4	5	6
◗ Learning to read may happen anytime between three and ten years. Comments:	1	2	3	4	5	6
◗ Learning to meet due dates is a skill that children and adults acquire through practicing organizational skills. Comments:	1	2	3	4	5	6
◗ Homework is not a necessity. Comments:	1	2	3	4	5	6

WHOLE SYSTEM **"Change the environment, not the individual"**	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion
◗ The best problem solving happens when all the parties involved participate. Comments:	1	2	3	4	5	6
◗ Communication and group interaction skills are as important as academics. Comments:	1	2	3	4	5	6
◗ It is a priority of mine to be involved in my child's education. Comments:	1	2	3	4	5	6
◗ It's important to acknowledge children's feelings. Comments:	1	2	3	4	5	6
◗ Teaching should address social, emotional, physical, spiritual and academic development. Comments:	1	2	3	4	5	6
◗ Parents should participate in school activities. Comments:	1	2	3	4	5	6
◗ Teachers should be available to conference with parents at any conveniently scheduled time. Comments:	1	2	3	4	5	6

KINA'OLE Excellence	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion
◗ I want a school that has clear values, and an overall vision and philosophy with which I can agree. Comments:	1	2	3	4	5	6
◗ It is important to be prompt and timely with administrative and financial obligations. Comments:	1	2	3	4	5	6
◗ A school's volunteer needs should be equally shared by teachers and parents. Comments:	1	2	3	4	5	6
◗ Children need to attend school consistently. Comments:	1	2	3	4	5	6
◗ Parents and teachers need to take equal responsibility for finding solutions to children's problems at school. Comments:	1	2	3	4	5	6
◗ It is important the school staff are committed to continuously improving and learning. Comments:	1	2	3	4	5	6
◗ It is important that caregivers and teachers are committed to education as a profession. Comments:	1	2	3	4	5	6
◗ The school and faculty need to be committed to common educational ideals, values and process. Comments.	1	2	3	4	5	6

APPENDIX C

Values Match Data Analysis

Hawaii Early Childhood Education Program Values Survey

Data Analysis

April 1995

Watson Wyatt
Worldwide

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Hawaii Montessori Values Survey

Data Analysis

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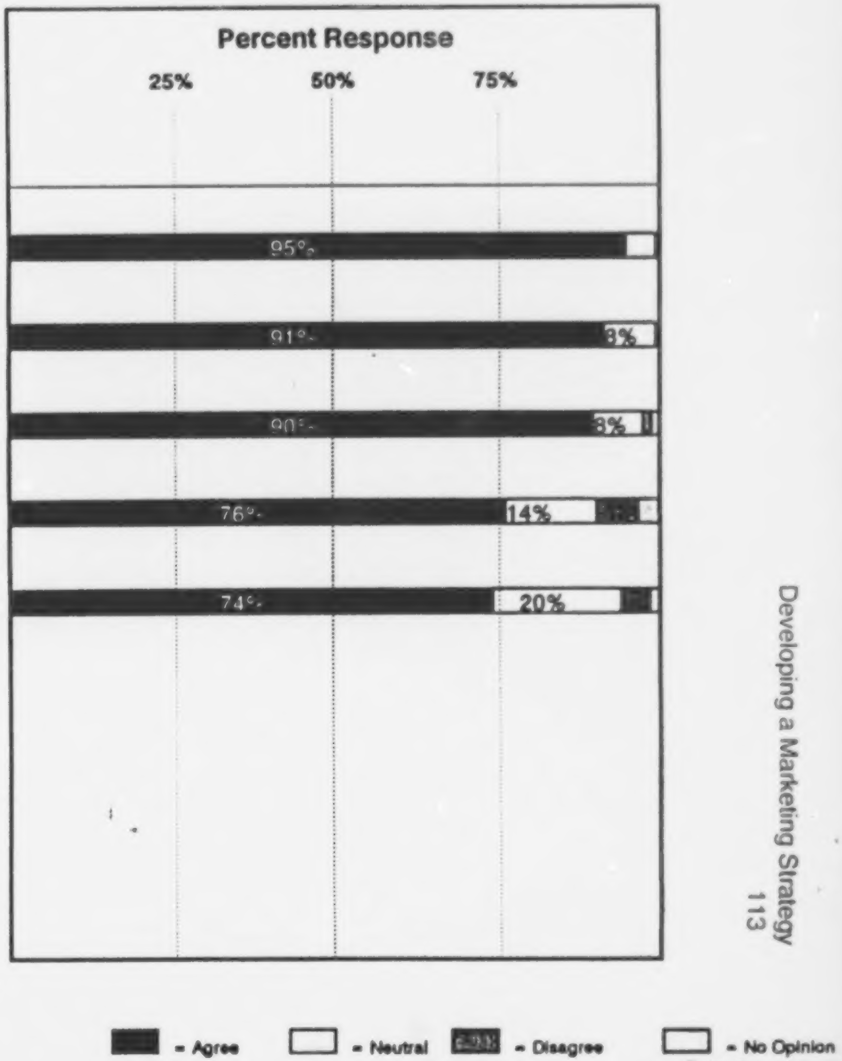
Hawaii Early Childhood Education Program
Values Survey

DIMENSION SUMMARY REPORT

Dimension
Whole System
Aloha
Kina'ole
Developmentally Appropriate
Trust in an Inner Guide



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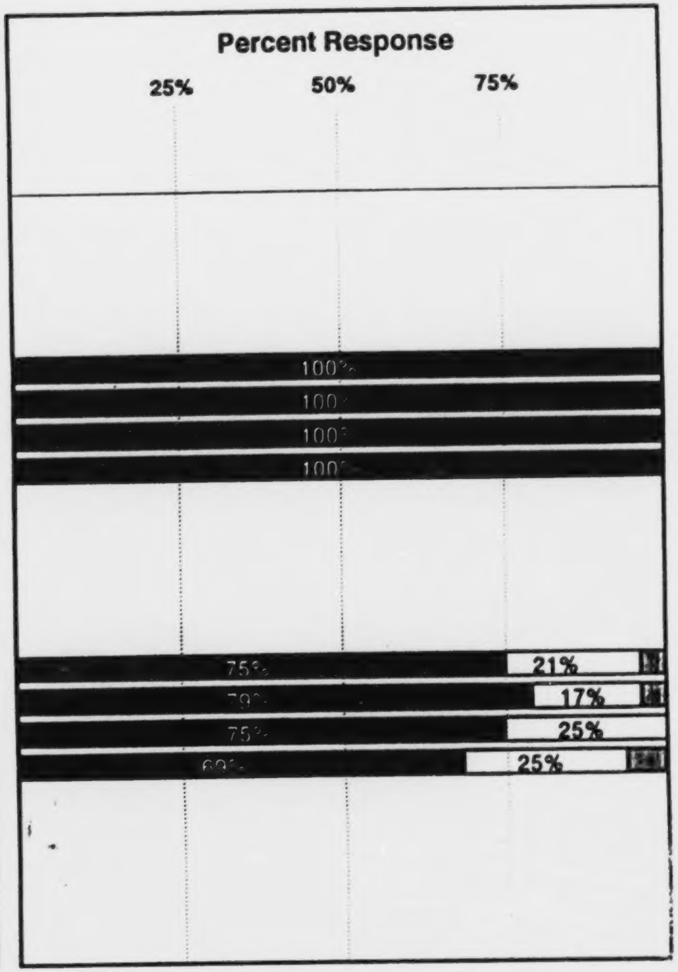
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Aloha	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Children and adults do their best when they are in a good mood and physically healthy.							
Overall	79%	21%	0%	0%	0%	0%	48
Waimea Preschool	79%	21%	0%	0%	0%	0%	24
Waimea Elementary	88%	13%	0%	0%	0%	0%	8
Kona Campus	75%	25%	0%	0%	0%	0%	16
Negative thoughts and words are not useful.							
Overall	48%	27%	21%	4%	0%	0%	48
Waimea Preschool	50%	29%	17%	4%	0%	0%	24
Waimea Elementary	50%	25%	25%	0%	0%	0%	8
Kona Campus	44%	25%	25%	6%	0%	0%	16



■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

Rounding may affect various figures.

Wyatt

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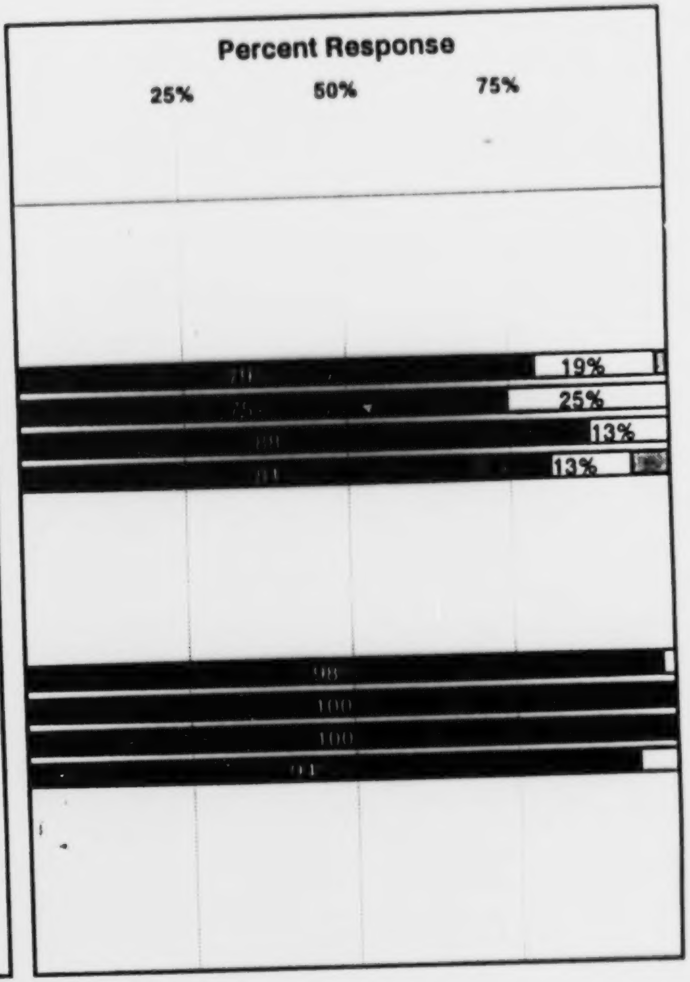
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Aloha	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Learning should always be fun and joyful. Deep concentration is a form of joy.							
Overall	27%	52%	19%	2%	0%	0%	48
Waimea Preschool	25%	50%	25%	0%	0%	0%	24
Waimea Elementary	38%	50%	13%	0%	0%	0%	8
Kona Campus	25%	56%	13%	6%	0%	0%	16
I believe in finding alternatives to physical punishment.							
Overall	69%	29%	2%	0%	0%	0%	48
Waimea Preschool	71%	29%	0%	0%	0%	0%	24
Waimea Elementary	88%	13%	0%	0%	0%	0%	8
Kona Campus	56%	38%	6%	0%	0%	0%	16



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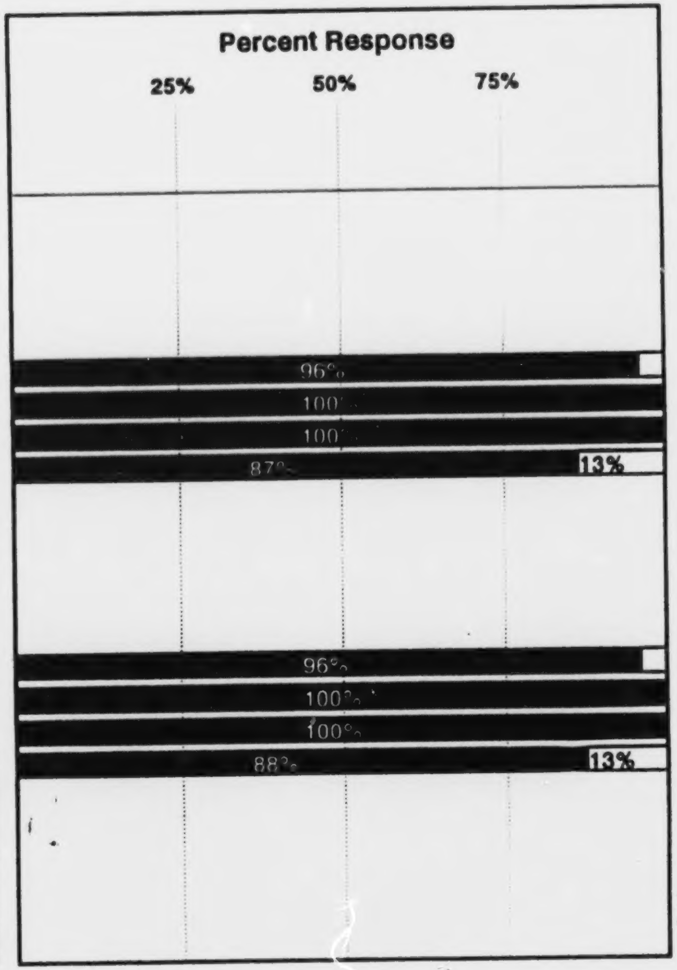
Rounding may affect various figures.

BEST COPY AVAILABLE

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Aloha	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Children and adults learn best when they build upon successes.							
Overall	57%	38%	4%	0%	0%	0%	47
Waimea Preschool	71%	29%	0%	0%	0%	0%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	40%	47%	13%	0%	0%	0%	15
Parents should give children the same respect they would give an adult.							
Overall	67%	29%	4%	0%	0%	0%	48
Waimea Preschool	71%	29%	0%	0%	0%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	56%	31%	13%	0%	0%	0%	16



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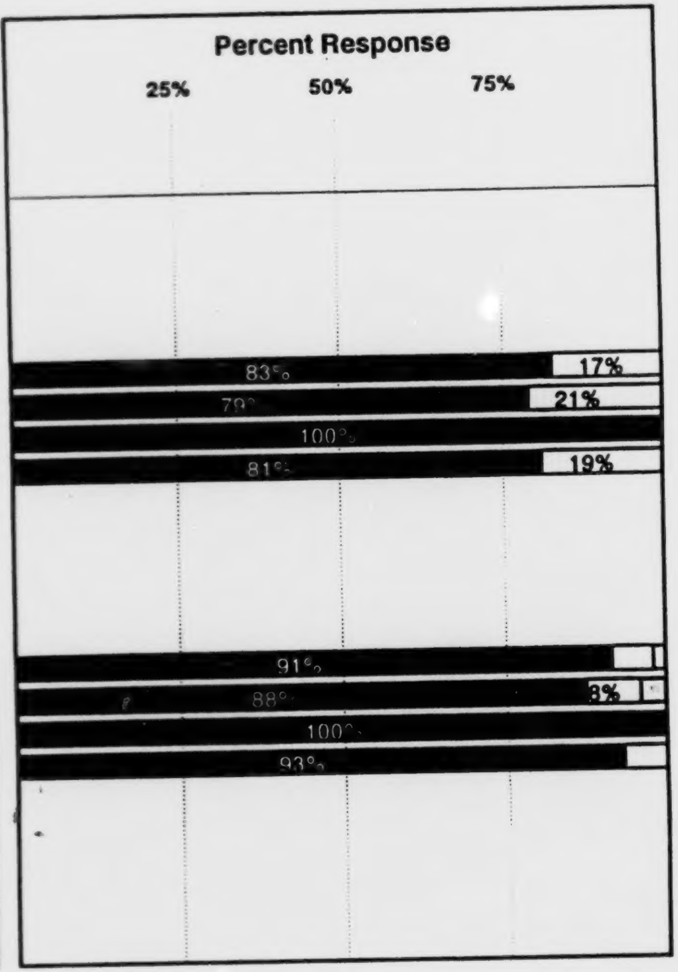
■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Aloha	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Finding fault is not useful.							
Overall	51%	32%	17%	0%	0%	0%	47
Waimea Preschool	46%	33%	21%	0%	0%	0%	24
Waimea Elementary	86%	14%	0%	0%	0%	0%	7
Kona Campus	44%	38%	19%	0%	0%	0%	16
Children and adults must feel emotionally safe before they can meet challenges.							
Overall	62%	30%	6%	0%	0%	2%	47
Waimea Preschool	54%	33%	8%	0%	0%	4%	24
Waimea Elementary	88%	13%	0%	0%	0%	0%	8
Kona Campus	60%	33%	7%	0%	0%	0%	15



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■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

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Hawaii Early Childhood Education Program
Values Survey

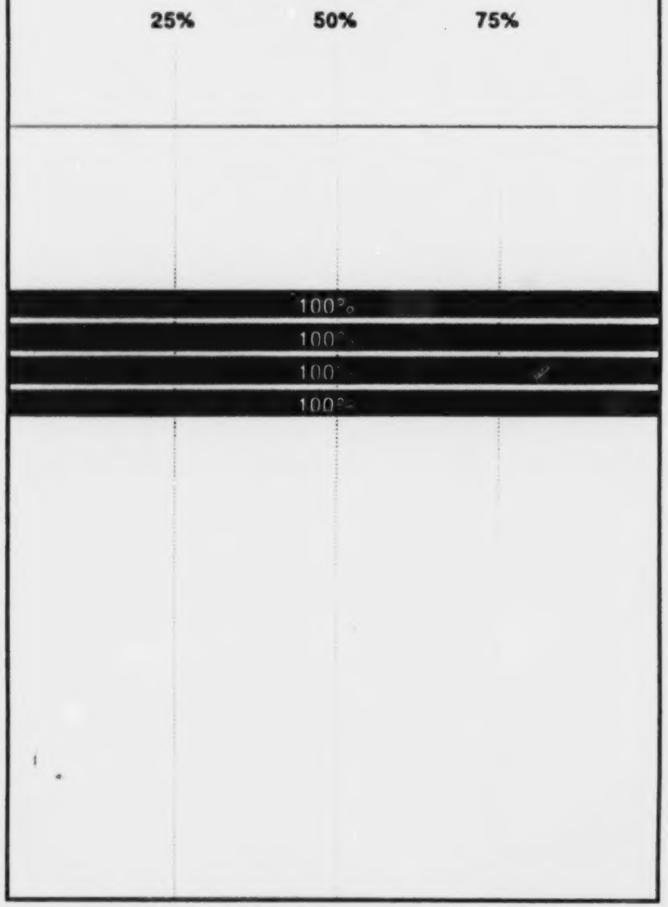
ITEM COMPARISON REPORT
Overall

Aloha

Children and adults need to know that mistakes are opportunities for learning.

	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Overall	71%	29%	0%	0%	0%	0%	48
Waimea Preschool	67%	33%	0%	0%	0%	0%	24
Waimea Elementary	88%	13%	0%	0%	0%	0%	8
Kona Campus	69%	31%	0%	0%	0%	0%	16

Percent Response



Rounding may affect various figures.

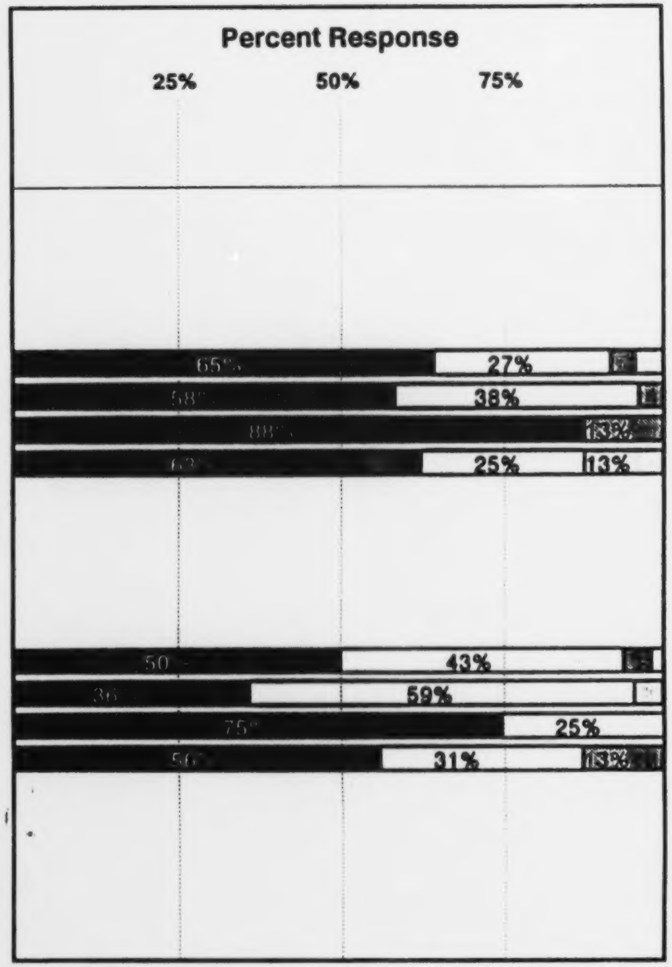
Wyatt

■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Trust in an Inner Guide	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respon-dents
Children can successfully learn to choose their own learning activities.							
Overall	21%	44%	27%	4%	0%	4%	48
Waimea Preschool	25%	33%	38%	4%	0%	0%	24
Waimea Elementary	25%	63%	0%	13%	0%	0%	8
Kona Campus	13%	50%	25%	0%	0%	13%	16
Children learn best in a noncompetive environment.							
Overall	17%	33%	43%	4%	0%	2%	46
Waimea Preschool	18%	18%	59%	0%	0%	5%	22
Waimea Elementary	50%	25%	25%	0%	0%	0%	8
Kona Campus	0%	56%	31%	13%	0%	0%	16



Rounding may affect various figures.

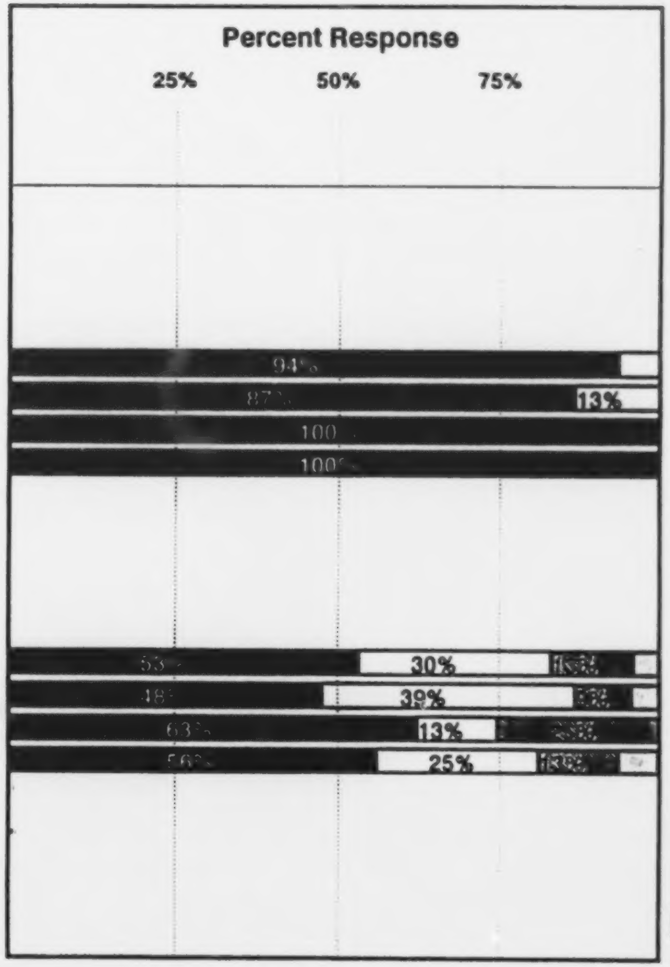
Wyatt

■ - Agree □ - Neutral ▨ - Disagree □ - Do Not Know

Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Trust in an Inner Guide	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Student interest is a good indicator of readiness to learn.							
Overall	45%	49%	6%	0%	0%	0%	47
Waimea Preschool	35%	52%	13%	0%	0%	0%	23
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	44%	56%	0%	0%	0%	0%	16
It is OK for a child to ignore curriculum areas like math for even weeks at a time, when they are demonstrating focus in other areas.							
Overall	19%	34%	30%	11%	2%	4%	47
Waimea Preschool	22%	26%	39%	9%	0%	4%	23
Waimea Elementary	25%	38%	13%	25%	0%	0%	8
Kona Campus	13%	44%	25%	6%	6%	6%	16



Rounding may affect various figures.

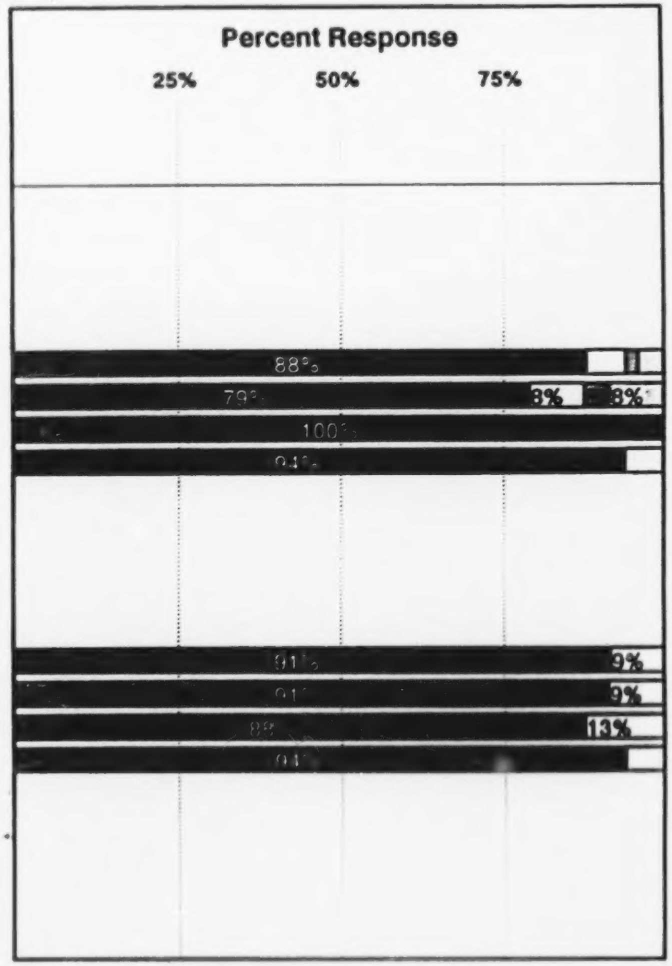
Wyatt

▮ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Trust in an Inner Guide	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
We can trust that there is a natural drive toward learning and growth.							
Overall	35%	52%	6%	2%	0%	4%	48
Waimea Preschool	29%	50%	8%	4%	0%	8%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	25%	69%	6%	0%	0%	0%	16
It is important for children to learn to be independent and self-sufficient.							
Overall	64%	28%	9%	0%	0%	0%	47
Waimea Preschool	70%	22%	9%	0%	0%	0%	23
Waimea Elementary	75%	13%	13%	0%	0%	0%	8
Kona Campus	50%	44%	6%	0%	0%	0%	16



Rounding may affect various figures.

Wyatt

■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

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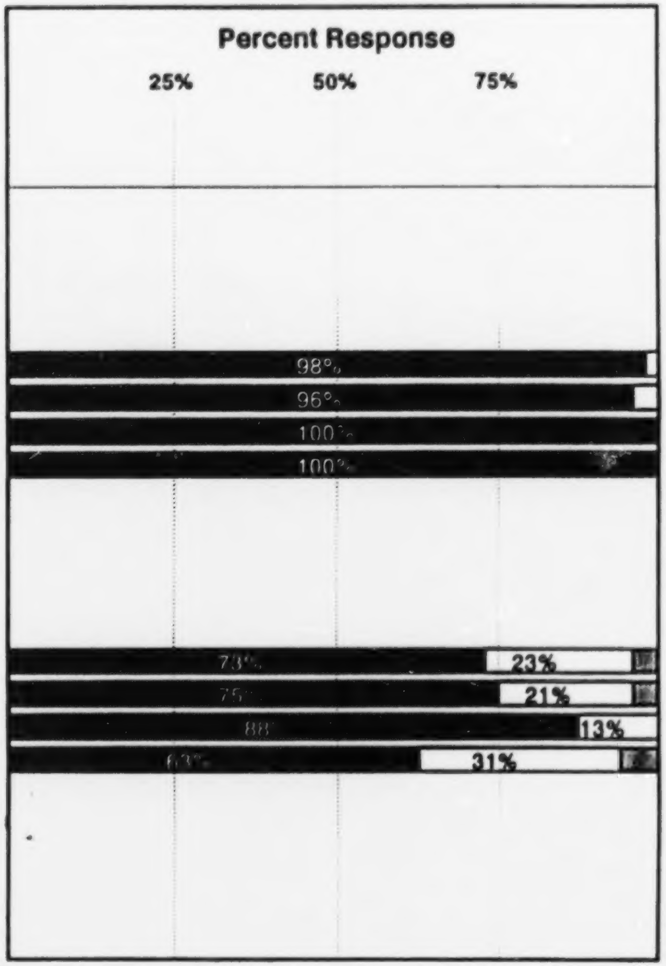
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Trust in an Inner Guide	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
It is important for children to develop a conscious will to make appropriate choices.							
Overall	60%	38%	2%	0%	0%	0%	48
Waimea Preschool	63%	33%	4%	0%	0%	0%	24
Waimea Elementary	88%	13%	0%	0%	0%	0%	8
Kona Campus	44%	56%	0%	0%	0%	0%	16
It is important for children to have free choice of work, so that teachers can build on their interests.							
Overall	27%	46%	23%	4%	0%	0%	48
Waimea Preschool	29%	46%	21%	4%	0%	0%	24
Waimea Elementary	25%	63%	13%	0%	0%	0%	8
Kona Campus	25%	38%	31%	6%	0%	0%	16



Rounding may affect various figures.

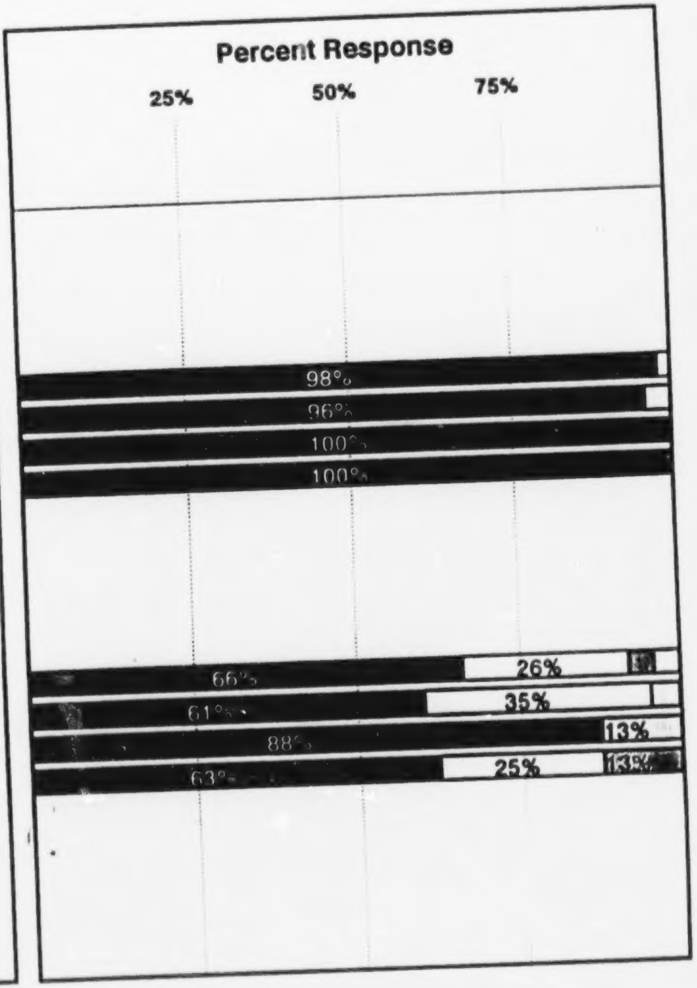
Wyatt

▇ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Trust in an Inner Guide	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
It is important for children to learn to honor boundaries and to respectfully question authority.							
Overall	48%	50%	2%	0%	0%	0%	48
Waimea Preschool	50%	46%	4%	0%	0%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	31%	69%	0%	0%	0%	0%	16
Competition is not necessary for optimum improvement.							
Overall	19%	47%	26%	4%	0%	4%	47
Waimea Preschool	26%	35%	35%	0%	0%	4%	23
Waimea Elementary	38%	50%	0%	0%	0%	13%	8
Kona Campus	0%	63%	25%	13%	0%	0%	16



■ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

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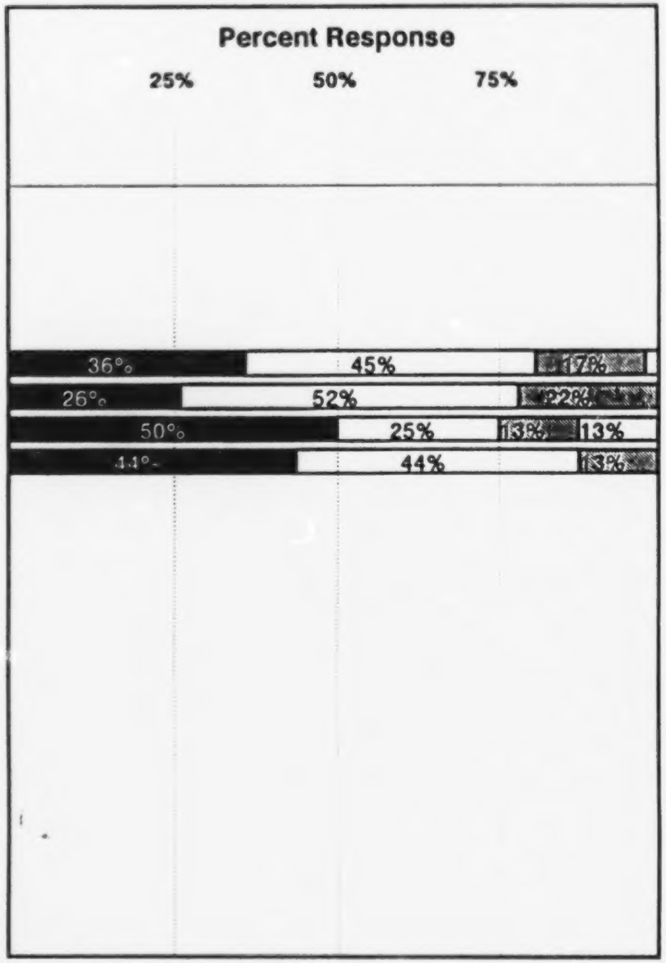
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Trust in an Inner Guide

Schools should not reward and punish.

	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Overall	15%	21%	45%	15%	2%	2%	47
Waimea Preschool	22%	4%	52%	22%	0%	0%	23
Waimea Elementary	13%	38%	25%	13%	0%	13%	8
Kona Campus	6%	38%	44%	6%	6%	0%	16



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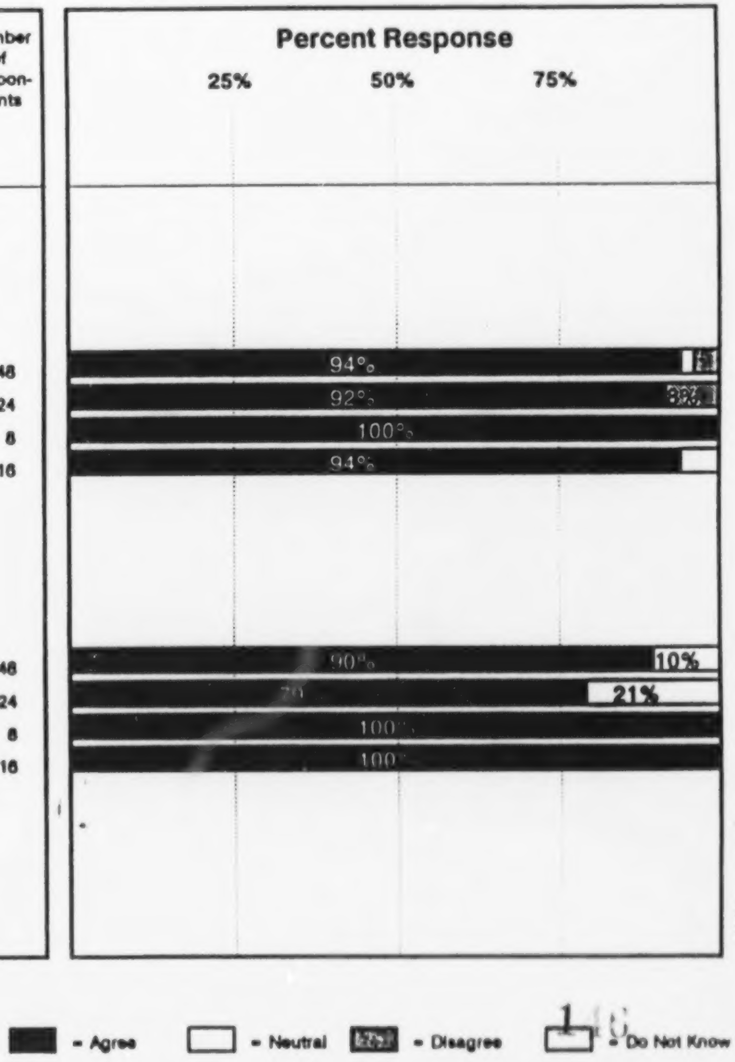
Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Developmentally Appropriate	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Math, language, music, physical education, personal relations, psychological development and spatial awareness are all equally important in a curriculum.							
Overall	46%	48%	2%	2%	2%	0%	48
Waimea Preschool	50%	42%	0%	4%	4%	0%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	38%	56%	6%	0%	0%	0%	16
Every child has their own developmental time clock and unique times when they are best able to learn different things.							
Overall	50%	40%	10%	0%	0%	0%	48
Waimea Preschool	50%	29%	21%	0%	0%	0%	24
Waimea Elementary	63%	38%	0%	0%	0%	0%	8
Kona Campus	44%	56%	0%	0%	0%	0%	16



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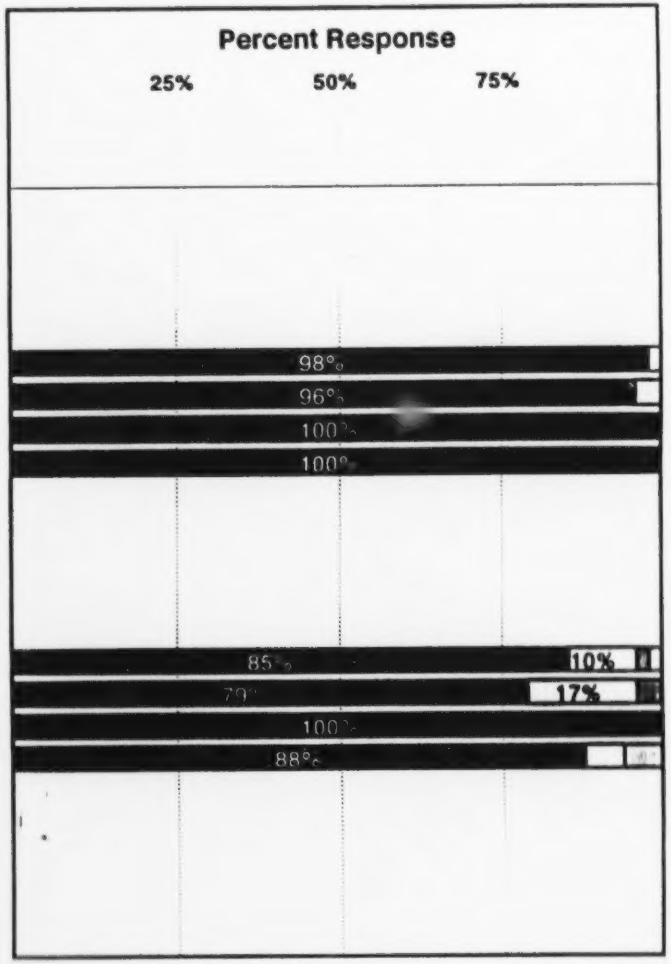
Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Developmentally Appropriate	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Knowing that each child learns differently is important.							
Overall	67%	31%	2%	0%	0%	0%	48
Waimea Preschool	63%	33%	4%	0%	0%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	69%	31%	0%	0%	0%	0%	16
Children must be developmentally ready before they are asked to learn to read.							
Overall	35%	50%	10%	0%	2%	2%	48
Waimea Preschool	38%	42%	17%	0%	4%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	13%	75%	6%	0%	0%	6%	16



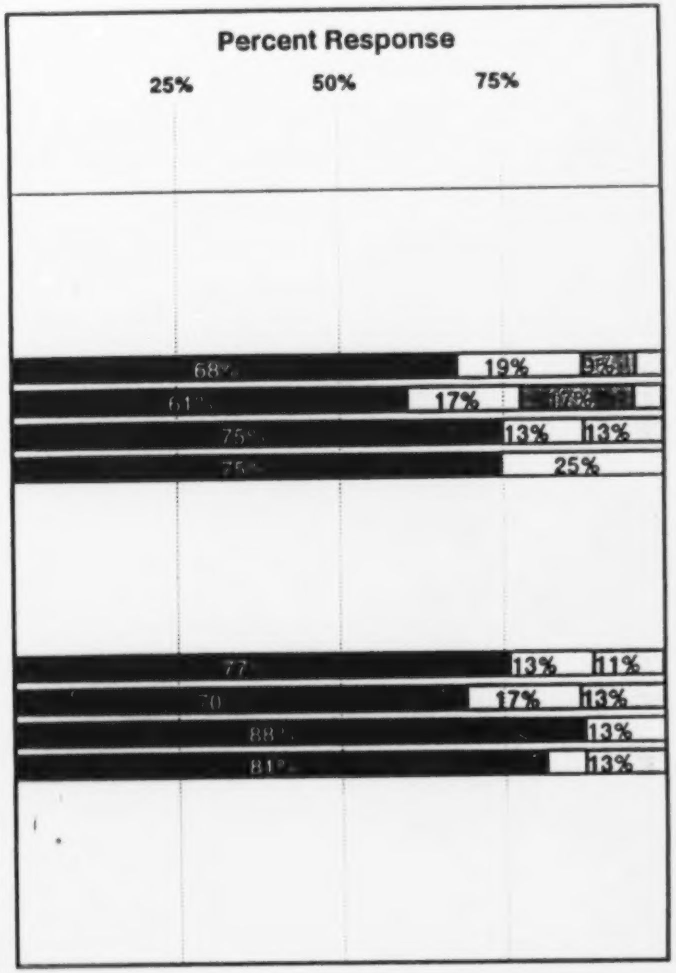
Rounding may affect various figures.

■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Developmentally Appropriate	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Teachers are responsible for assessing mastery at each stage before moving the child on.							
Overall	19%	49%	19%	9%	0%	4%	47
Waimea Preschool	9%	52%	17%	17%	0%	4%	23
Waimea Elementary	63%	13%	13%	0%	0%	13%	8
Kona Campus	13%	63%	25%	0%	0%	0%	16
Competencies are more important than grade level norms.							
Overall	26%	51%	13%	0%	0%	11%	47
Waimea Preschool	22%	48%	17%	0%	0%	13%	23
Waimea Elementary	63%	25%	13%	0%	0%	0%	8
Kona Campus	13%	69%	6%	0%	0%	13%	16



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■ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

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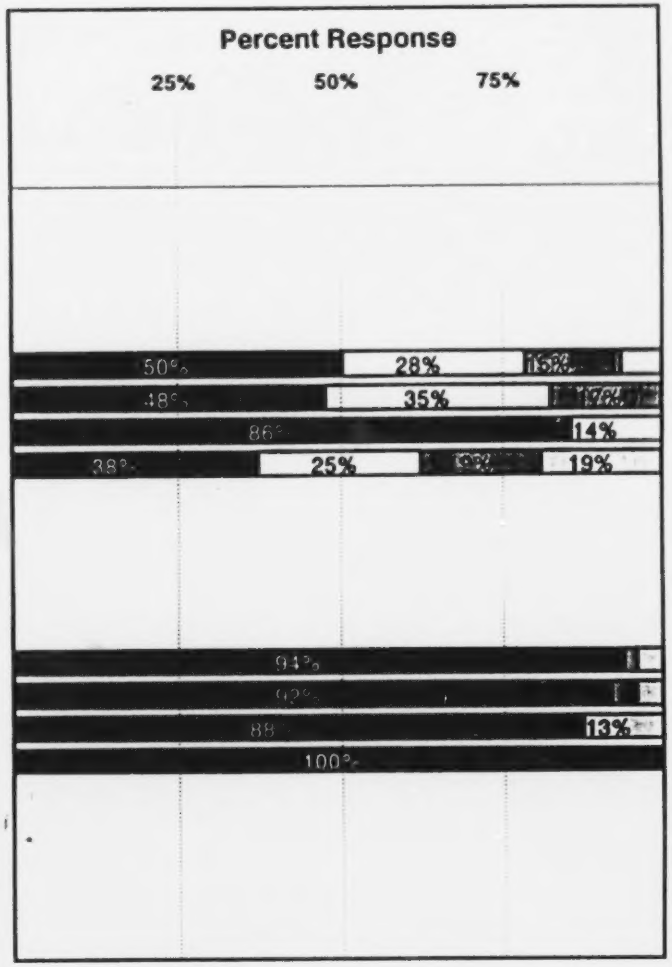
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Developmentally Appropriate	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respon-dents
Learning to read may happen anytime between three and ten years.							
Overall	15%	35%	28%	13%	2%	7%	46
Waimea Preschool	13%	35%	35%	13%	4%	0%	23
Waimea Elementary	57%	29%	14%	0%	0%	0%	7
Kona Campus	0%	38%	25%	19%	0%	19%	16
Learning to meet due dates is a skill that children and adults acquire through practicing.							
Overall	32%	62%	0%	2%	0%	4%	47
Waimea Preschool	42%	50%	0%	4%	0%	4%	24
Waimea Elementary	25%	63%	0%	0%	0%	13%	8
Kona Campus	20%	80%	0%	0%	0%	0%	15



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Rounding may affect various figures.

Wyatt

■ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

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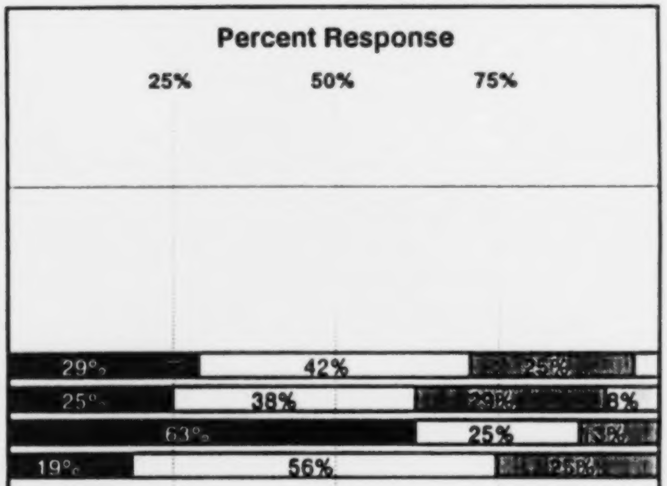
Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Developmentally Appropriate	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Homework is not a necessity.							
Overall	6%	23%	42%	19%	6%	4%	48
Waimea Preschool	4%	21%	38%	17%	13%	8%	24
Waimea Elementary	25%	38%	25%	13%	0%	0%	8
Kona Campus	0%	19%	56%	25%	0%	0%	16



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■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

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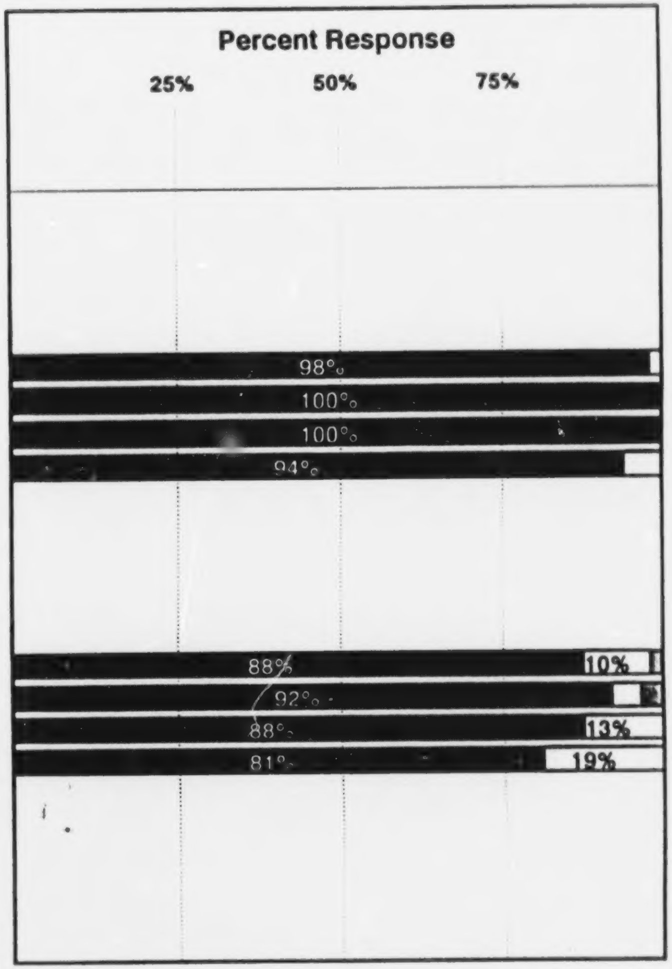
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Whole System	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
The best problem solving happens when all the parties involved participate.							
Overall	52%	46%	2%	0%	0%	0%	48
Waimea Preschool	67%	33%	0%	0%	0%	0%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	31%	63%	6%	0%	0%	0%	16
Communication and group interaction skills are as important as academics.							
Overall	54%	33%	10%	2%	0%	0%	48
Waimea Preschool	63%	29%	4%	4%	0%	0%	24
Waimea Elementary	50%	38%	13%	0%	0%	0%	8
Kona Campus	44%	38%	19%	0%	0%	0%	16



Rounding may affect various figures.

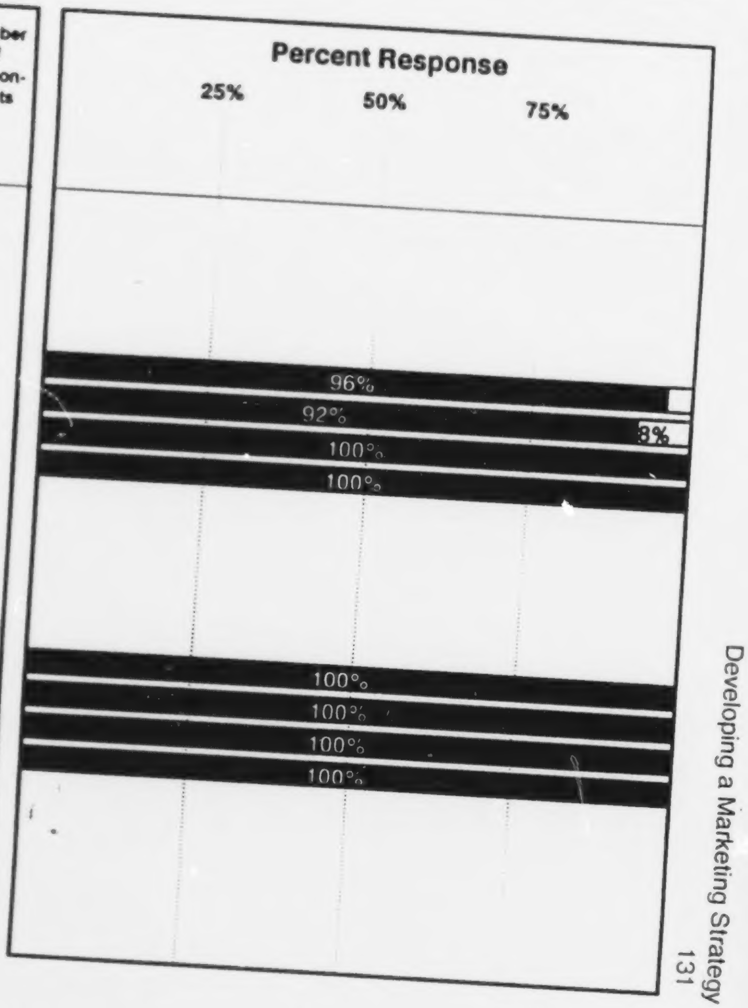
Wyatt

■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Whole System	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
It is a priority of mine to be involved in my child's education.							
Overall	73%	23%	4%	0%	0%	0%	48
Waimea Preschool	71%	21%	8%	0%	0%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	75%	25%	0%	0%	0%	0%	16
It's important to acknowledge children's feelings.							
Overall	79%	21%	0%	0%	0%	0%	48
Waimea Preschool	75%	25%	0%	0%	0%	0%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	88%	13%	0%	0%	0%	0%	16



Rounding may affect various figures.

Wyatt

■ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

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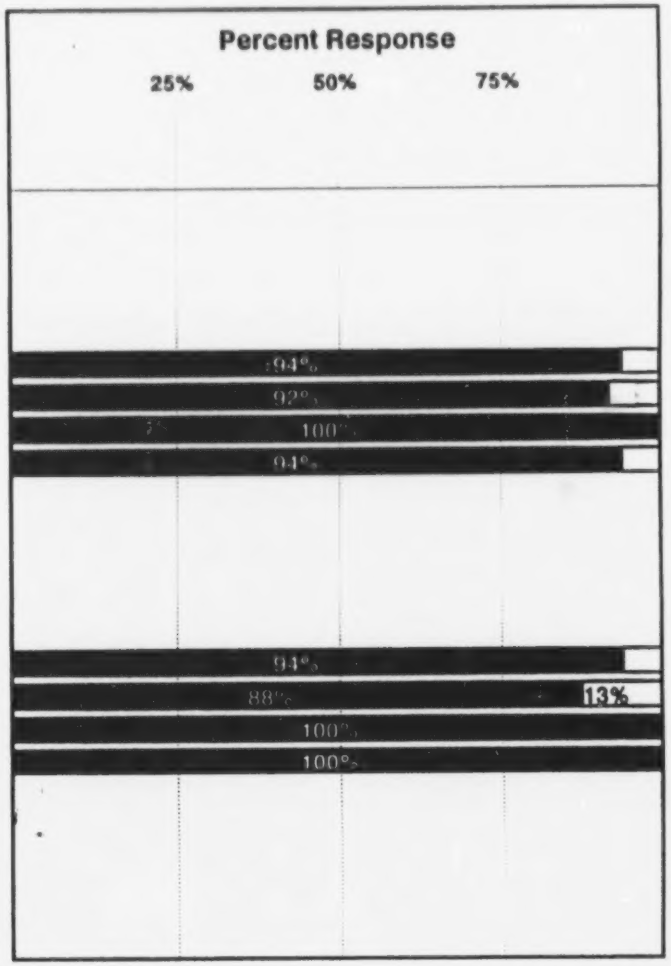
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Whole System	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Teaching should address social, emotional, physical, spiritual and academic development.							
Overall	63%	31%	4%	0%	0%	2%	48
Waimea Preschool	58%	33%	4%	0%	0%	4%	24
Waimea Elementary	75%	25%	0%	0%	0%	0%	8
Kona Campus	63%	31%	6%	0%	0%	0%	16
Parents should participate in school activities							
Overall	46%	48%	6%	0%	0%	0%	48
Waimea Preschool	42%	46%	13%	0%	0%	0%	24
Waimea Elementary	63%	38%	0%	0%	0%	0%	8
Kona Campus	44%	56%	0%	0%	0%	0%	16



Rounding may affect various figures.

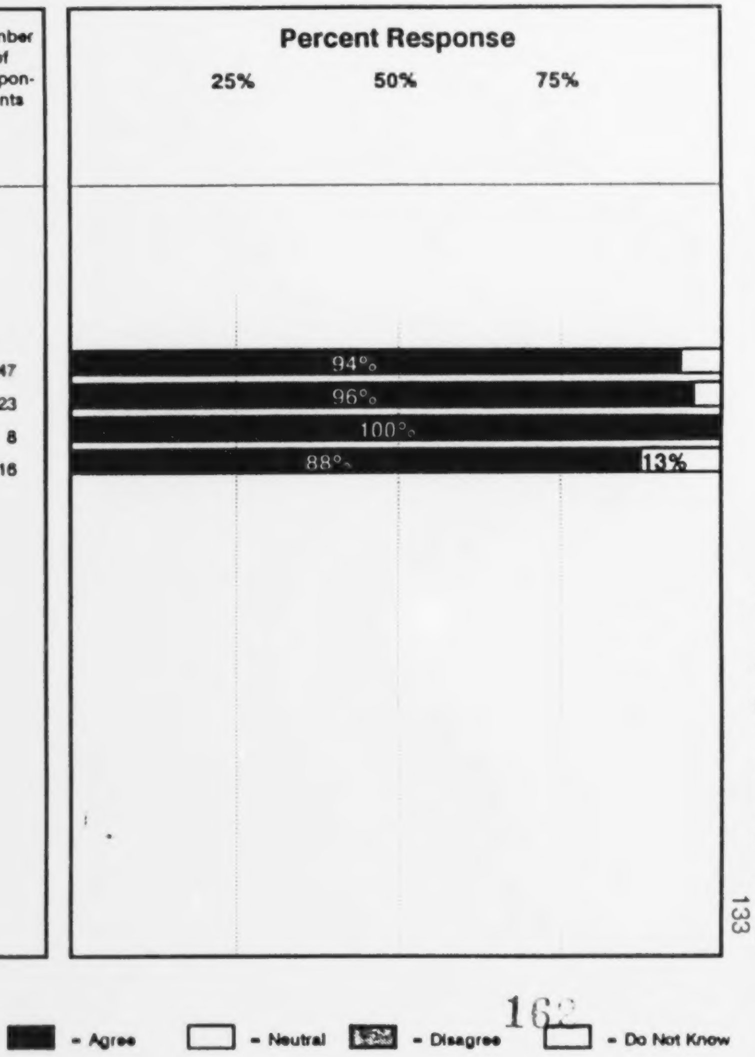
Wyatt

■ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Whole System	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Teachers should be available to conference with parents at any conveniently scheduled time.							
Overall	38%	55%	6%	0%	0%	0%	47
Waimea Preschool	43%	52%	4%	0%	0%	0%	23
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	25%	63%	13%	0%	0%	0%	16



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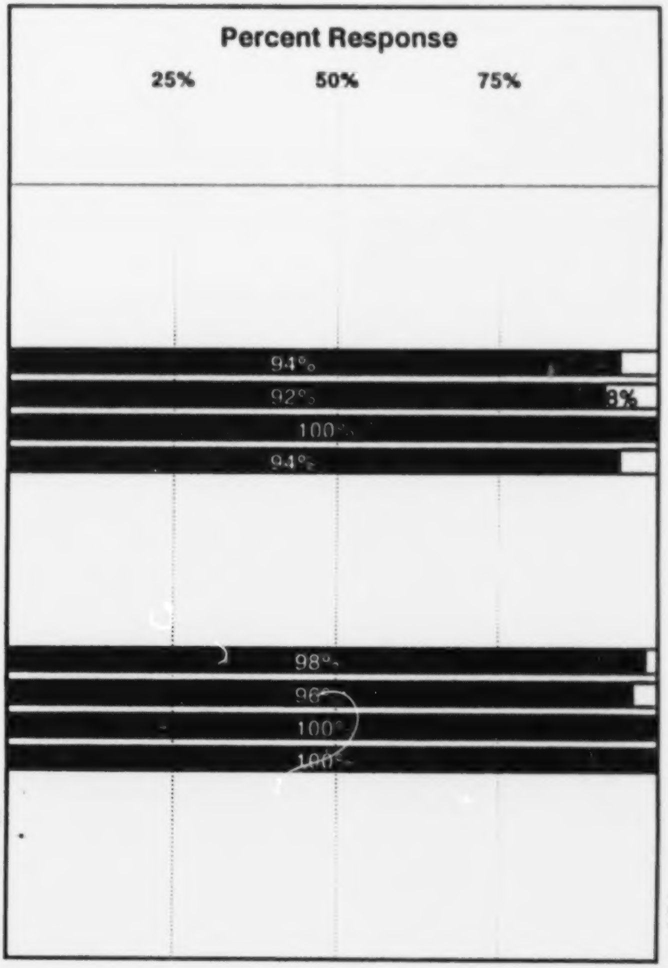
Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Kina'ole	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
I want a school that has clear values, and an overall vision and philosophy with which I can agree.							
Overall	40%	54%	6%	0%	0%	0%	48
Waimea Preschool	38%	54%	8%	0%	0%	0%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	38%	56%	6%	0%	0%	0%	16
It is important to be prompt and timely with administrative and financial obligations.							
Overall	33%	65%	2%	0%	0%	0%	48
Waimea Preschool	42%	54%	4%	0%	0%	0%	24
Waimea Elementary	38%	63%	0%	0%	0%	0%	8
Kona Campus	19%	81%	0%	0%	0%	0%	16



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Rounding may affect various figures.

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█ = Agree ☐ = Neutral ▨ = Disagree ☐ = Do Not Know

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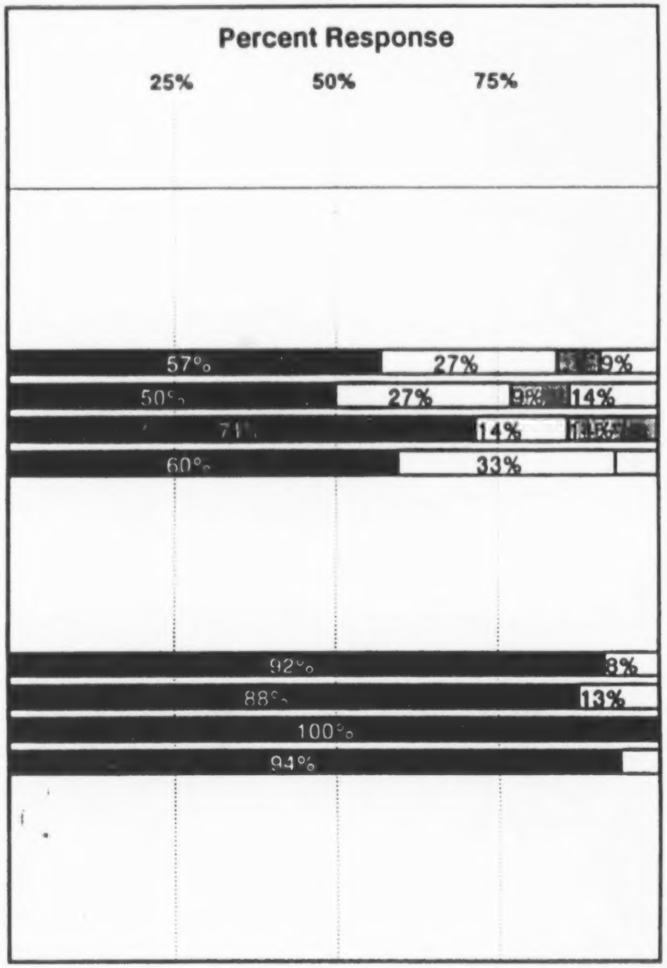
ITEM COMPARISON REPORT
Overall

Hawaii Early Childhood Education Program
Values Survey

Kina'ole	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
A school's volunteer needs should be equally shared by teachers and parents.							
Overall	16%	41%	27%	7%	0%	9%	44
Waimea Preschool	18%	32%	27%	9%	0%	14%	22
Waimea Elementary	14%	57%	14%	14%	0%	0%	7
Kona Campus	13%	47%	33%	0%	0%	7%	15
Children need to attend school consistently.							
Overall	33%	58%	8%	0%	0%	0%	48
Waimea Preschool	33%	54%	13%	0%	0%	0%	24
Waimea Elementary	38%	63%	0%	0%	0%	0%	8
Kona Campus	31%	63%	6%	0%	0%	0%	16



Rounding may affect various figures.

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■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

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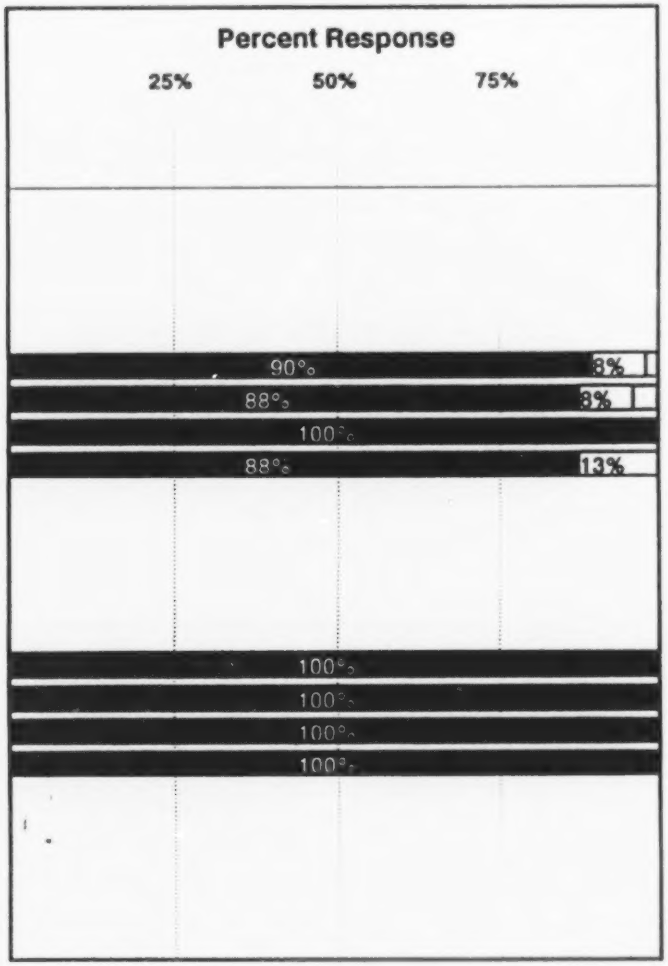
Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Kina'ole	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
Parents and teachers need to take equal responsibility for finding solutions to children's problems at school							
Overall	42%	48%	8%	0%	0%	2%	48
Waimea Preschool	38%	50%	8%	0%	0%	4%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	44%	44%	13%	0%	0%	0%	16
It is important the school staff are committed to continuously improving and learning.							
Overall	51%	49%	0%	0%	0%	0%	47
Waimea Preschool	58%	42%	0%	0%	0%	0%	24
Waimea Elementary	63%	38%	0%	0%	0%	0%	8
Kona Campus	33%	67%	0%	0%	0%	0%	15



Rounding may affect various figures.

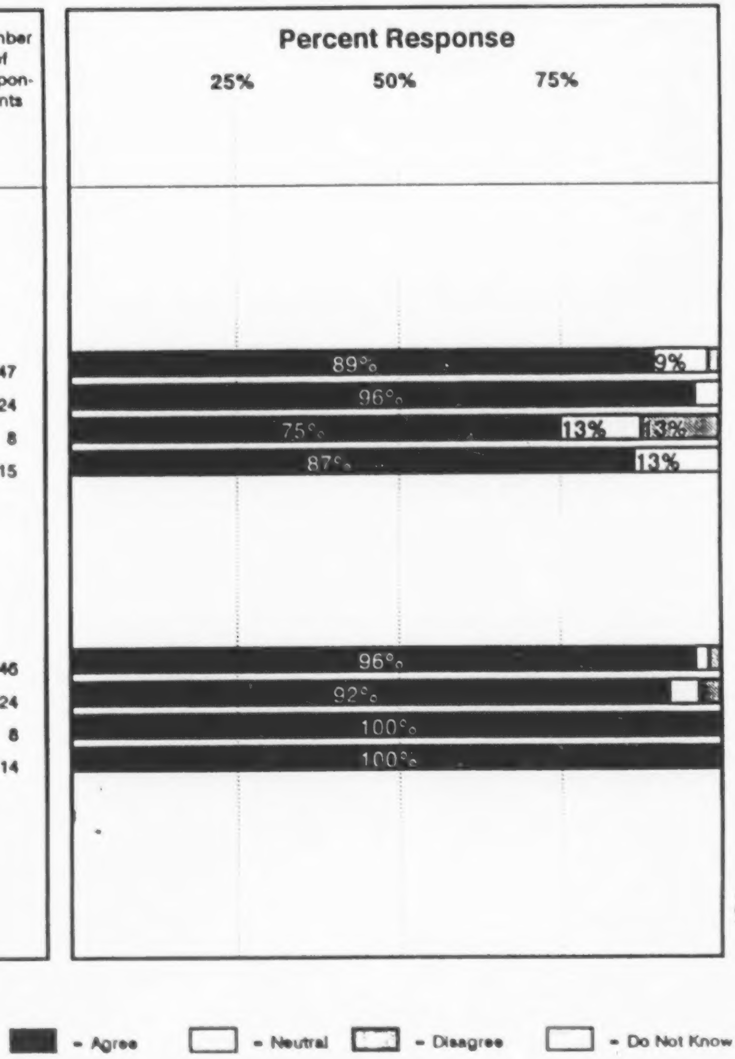
Wyatt

■ - Agree ☐ - Neutral ▨ - Disagree ☐ - Do Not Know

Hawaii Early Childhood Education Program
Values Survey

ITEM COMPARISON REPORT
Overall

Kina'ole	Strongly Agree	Agree	Partly Agree/ Partly Disagree	Disagree	Strongly Disagree	Don't Know/ No Opinion	Number of Respondents
It is important that caregivers and teachers are committed to education as a profession.							
Overall	43%	47%	9%	0%	2%	0%	47
Waimea Preschool	50%	46%	4%	0%	0%	0%	24
Waimea Elementary	38%	38%	13%	0%	13%	0%	8
Kona Campus	33%	53%	13%	0%	0%	0%	15
The school and faculty need to be committed to common educational ideals, values and process.							
Overall	43%	52%	2%	2%	0%	0%	46
Waimea Preschool	42%	50%	4%	4%	0%	0%	24
Waimea Elementary	50%	50%	0%	0%	0%	0%	8
Kona Campus	43%	57%	0%	0%	0%	0%	14



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APPENDIX D

Marketing Survey Tool

(School Name) MARKETING SURVEY

How did you become aware of our school? **Check all that apply:**

_____ Word of mouth
_____ Sign
_____ Poster
_____ Library
_____ Radio
____ Siblings attended
____ Pediatrician
____ Yellow pages
____ Government agency
____ Newspaper
____ Church
____ Local employer
____ Realtor

What school characteristics are most important to you?

Please check the characteristcs **most important to you** (maximum eight):

Then tell us how you rate our programs:

	Poor		Satisfactory		Great	Don't Know
Professionally trained staff	1	2	3	4	5	6
A clean and safe environment	1	2	3	4	5	6
Warm and loving caregivers	1	2	3	4	5	6
Keeping parents informed	1	2	3	4	5	6
School and parents work as a team	1	2	3	4	5	6
Affordability	1	2	3	4	5	6
Flexible hours	1	2	3	4	5	6
Parent education classes	1	2	3	4	5	6
Individualized attention	1	2	3	4	5	6
Easy access to the school location	1	2	3	4	5	6
Classrooms open to parents for observation	1	2	3	4	5	6
Classrooms open to parents for participation	1	2	3	4	5	6
Fosters self-esteem	1	2	3	4	5	6
Strong academic program	1	2	3	4	5	6
Strong basic curriculum	1	2	3	4	5	6
"Extracurricular" activities	1	2	3	4	5	6
Integrated, balanced curriculum	1	2	3	4	5	6
Class size, teacher/ student ratio	1	2	3	4	5	6
Strong discipline	1	2	3	4	5	6
Religious instruction	1	2	3	4	5	6
Bright & colorful decorations	1	2	3	4	5	6
Children are happy	1	2	3	4	5	6
Beautiful environment	1	2	3	4	5	6
Facilities and buildings	1	2	3	4	5	6
Child's friends attend school	1	2	3	4	5	6
Child's preference	1	2	3	4	5	6

APPENDIX E

Marketing Survey Data Analysis

Hawaii Early Childhood Education Program Marketing Survey

Data Analysis

April 1995

Watson Wyatt
Worldwide

Hawaii Early Childhood Education Program
Marketing Survey

Data Analysis

Contents **Page #**

Ranking of Methods by which people gain awareness of the school (overall results) *1*

Ranking of Methods by which people gain awareness of the school (Waimea Preschool, Elementary, and Kona Campus breakouts) *2*

Ranking of Important School Characteristics (overall results) *3*

Ranking of Important School Characteristics (Waimea Preschool results) *4*

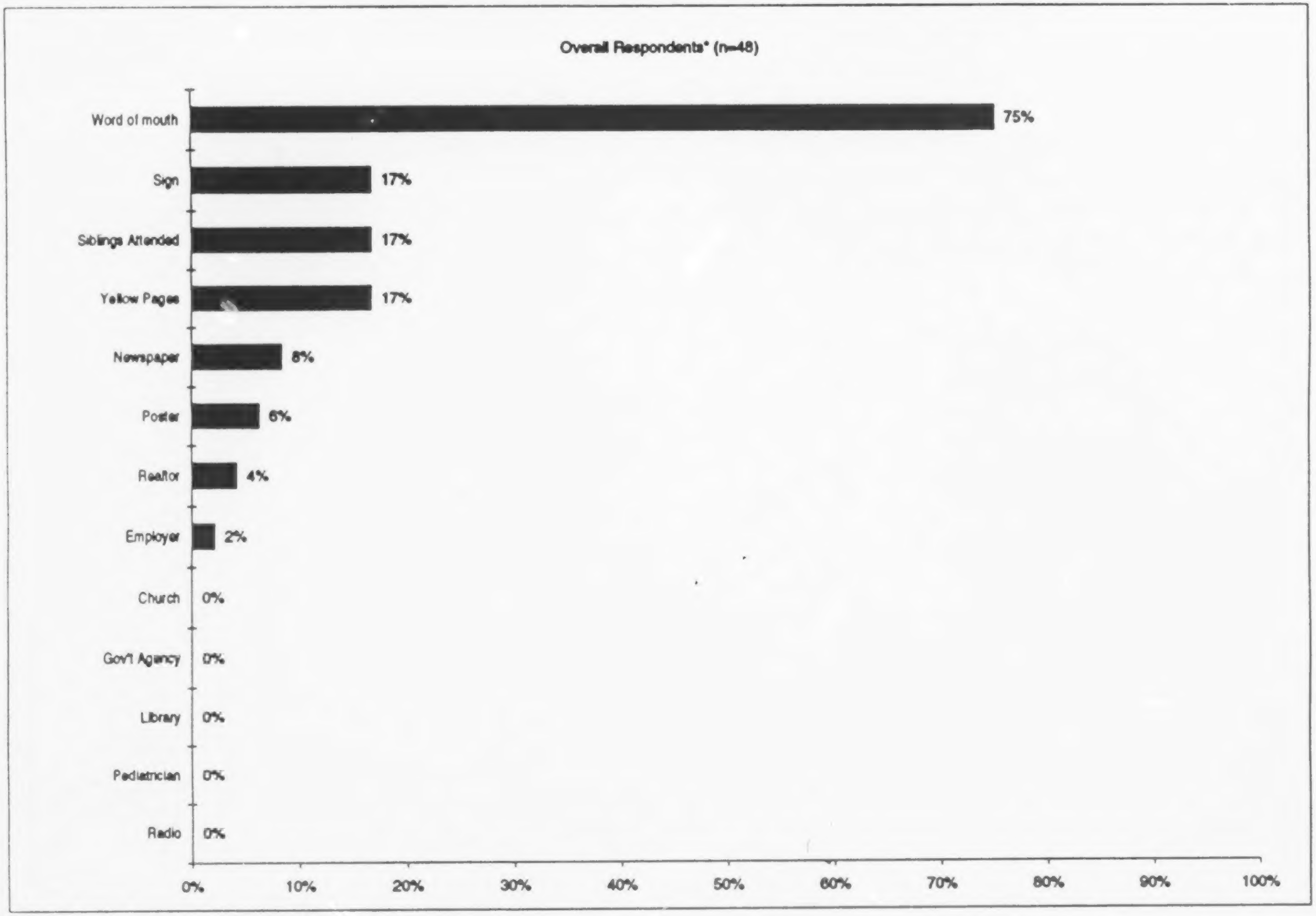
Ranking of Important School Characteristics (Waimea Elementary results) *5*

Ranking of Important School Characteristics (Kona Campus results) *6*

Important School Characteristics item ratings (Overall, Waimea Preschool, Elementary, and Kona Campus breakouts) *7*

Hawai'i Early Childhood Education Program Marketing Survey

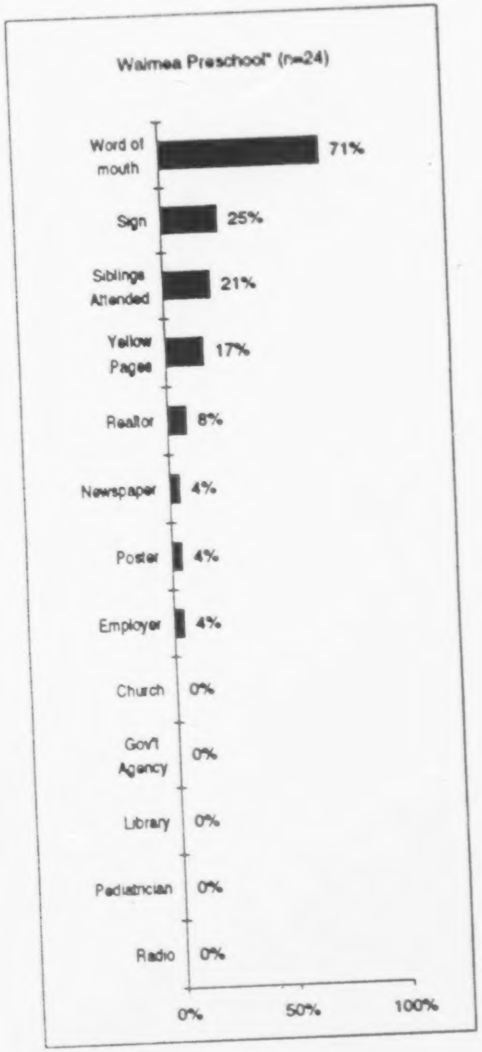
Methods of Gaining Awareness of School

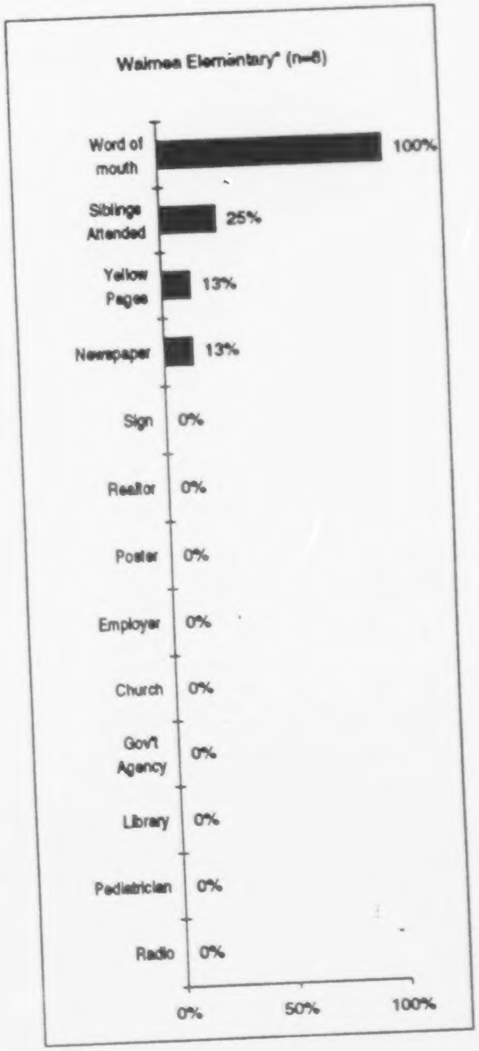


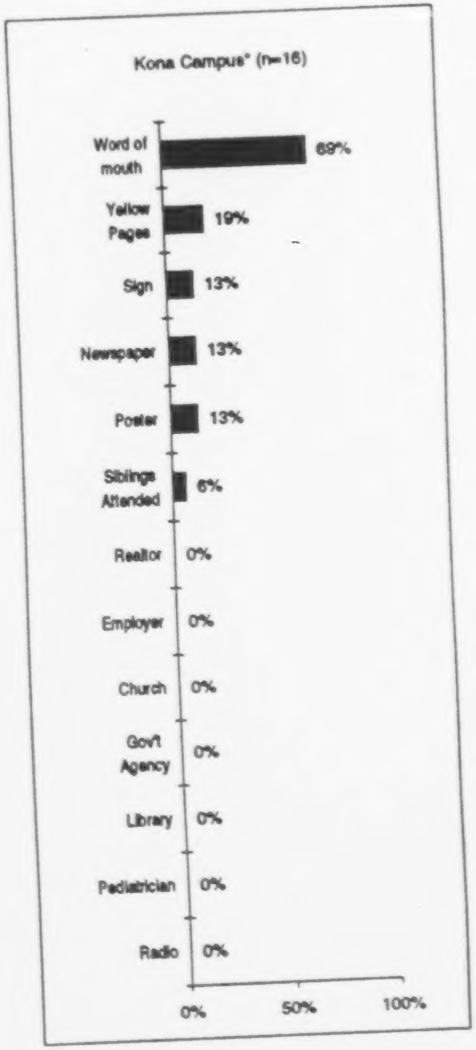
* % of respondents that checked items.

Hawai'i Early Childhood Education Program Marketing Survey

Methods of Gaining Awareness of School







* % of respondents that checked items.

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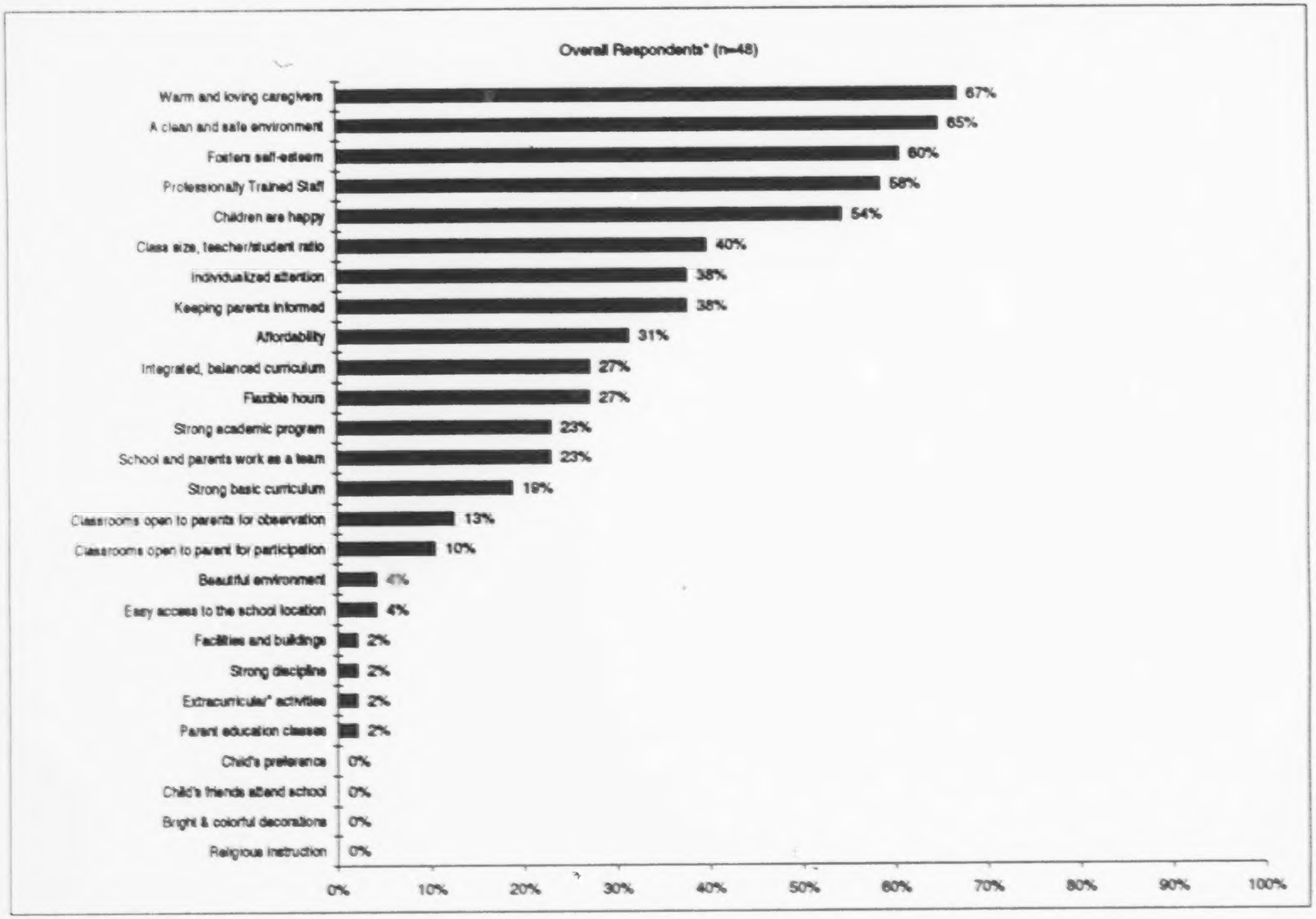
Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics



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* % of respondents that checked items.

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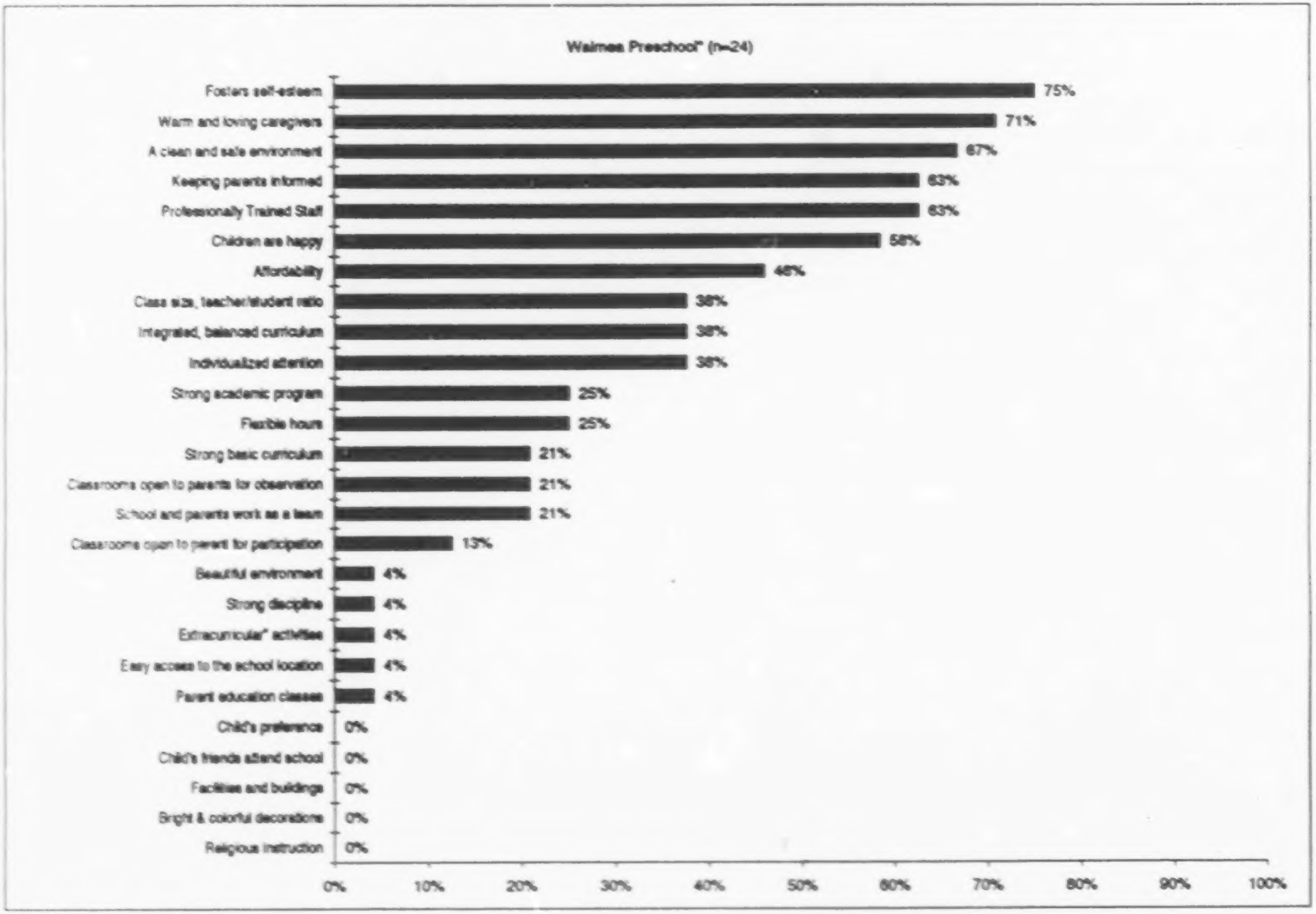
Important School Characteristics



* % of respondents that checked items.

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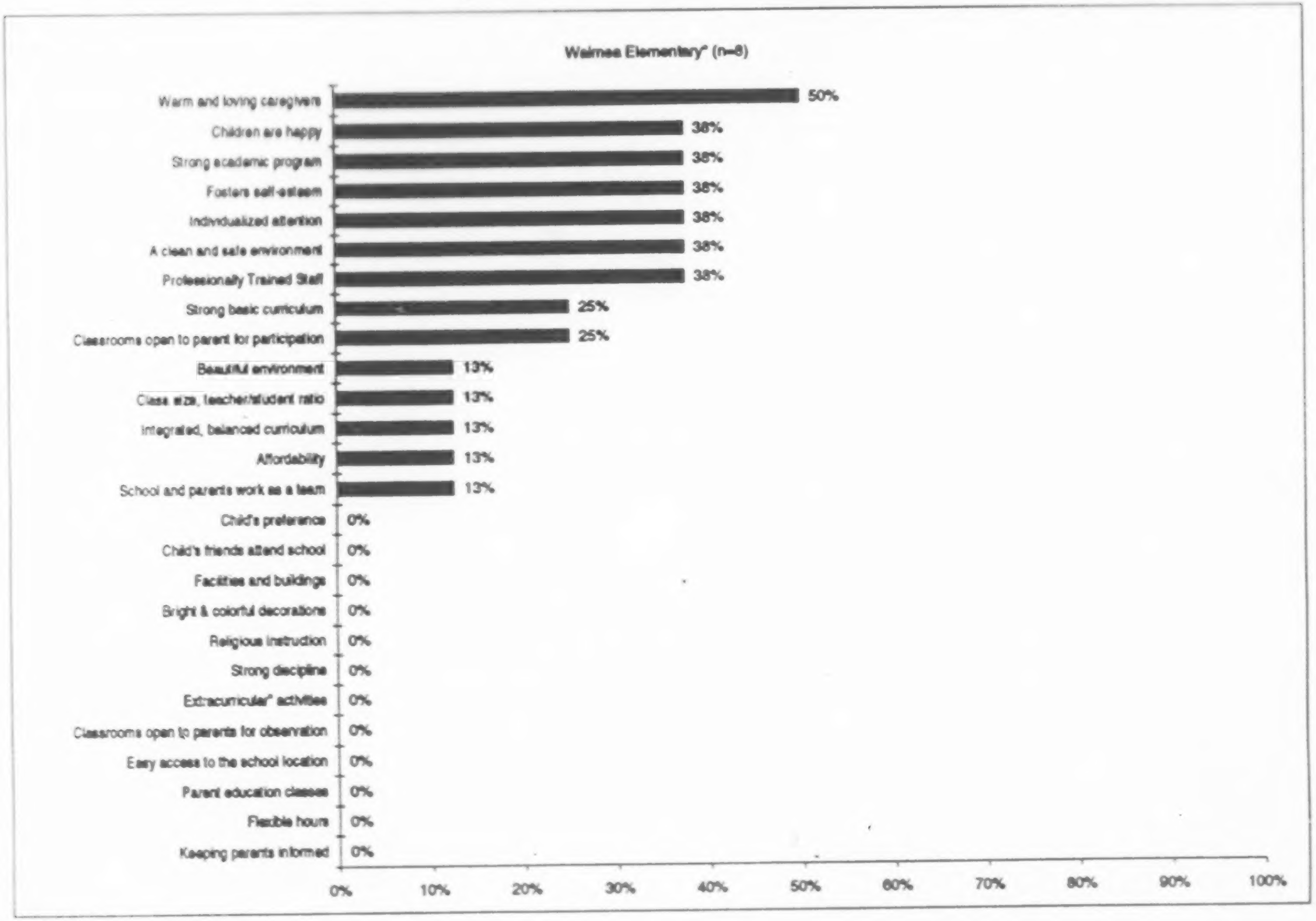
Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics



** % of respondents that checked items.*

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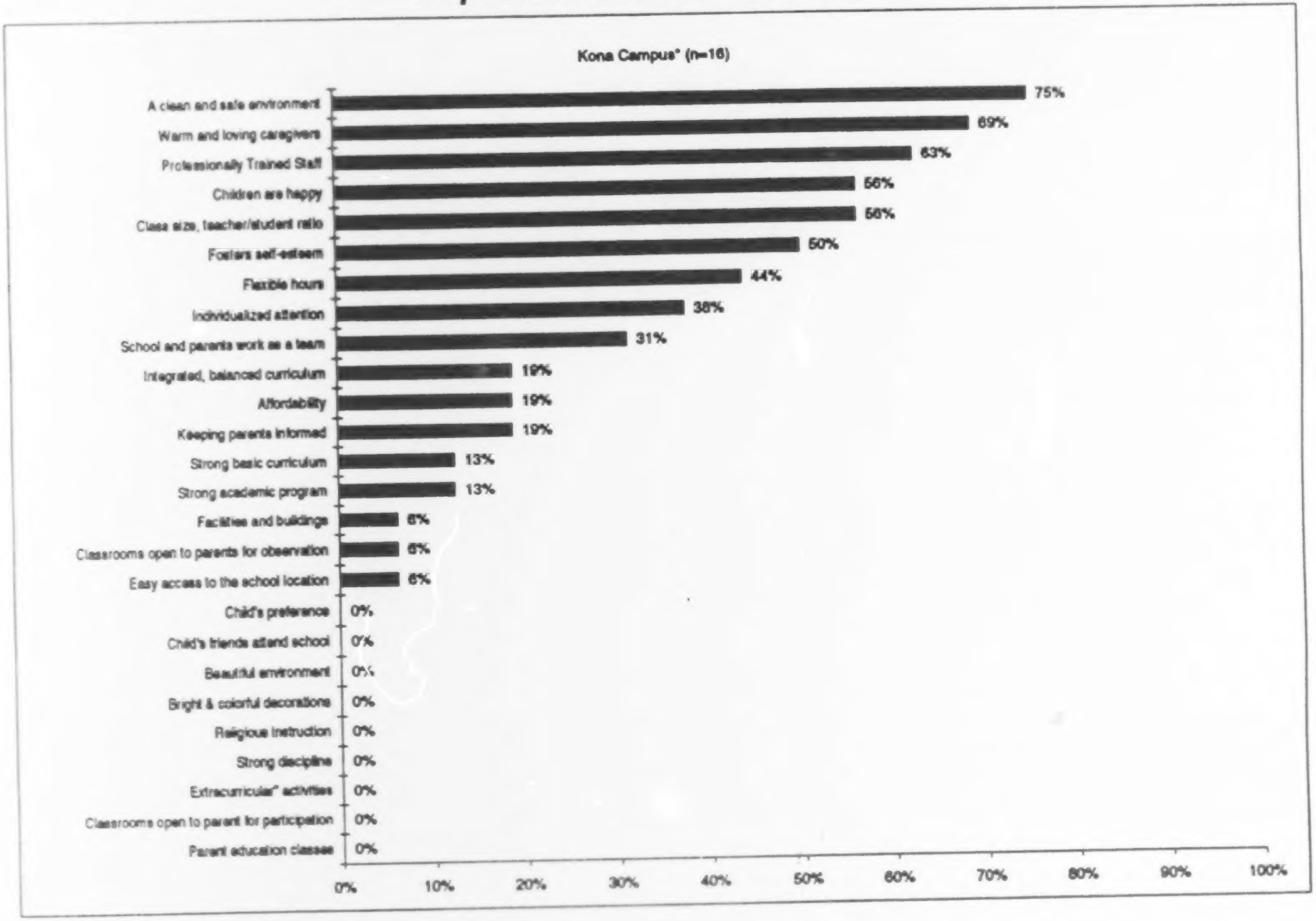
Hawai'i Early Childhood Education Program Marketing Survey

Important School Characteristics



* % of respondents that checked items.

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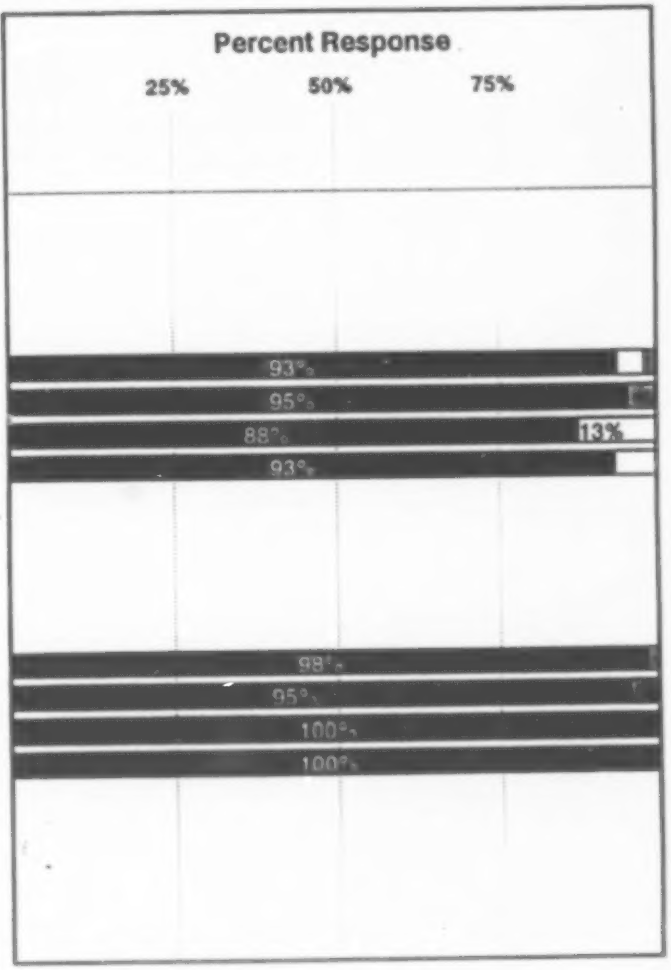
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Professionally trained staff.							
Overall	0%	2%	5%	30%	64%	0%	44
Waimea Preschool	0%	5%	0%	29%	67%	0%	21
Waimea Elementary	0%	0%	13%	25%	63%	0%	8
Kona Campus	0%	0%	7%	33%	60%	0%	15
A clean and safe environment.							
Overall	0%	2%	0%	36%	62%	0%	45
Waimea Preschool	0%	5%	0%	33%	62%	0%	21
Waimea Elementary	0%	0%	0%	50%	50%	0%	8
Kona Campus	0%	0%	0%	31%	69%	0%	16



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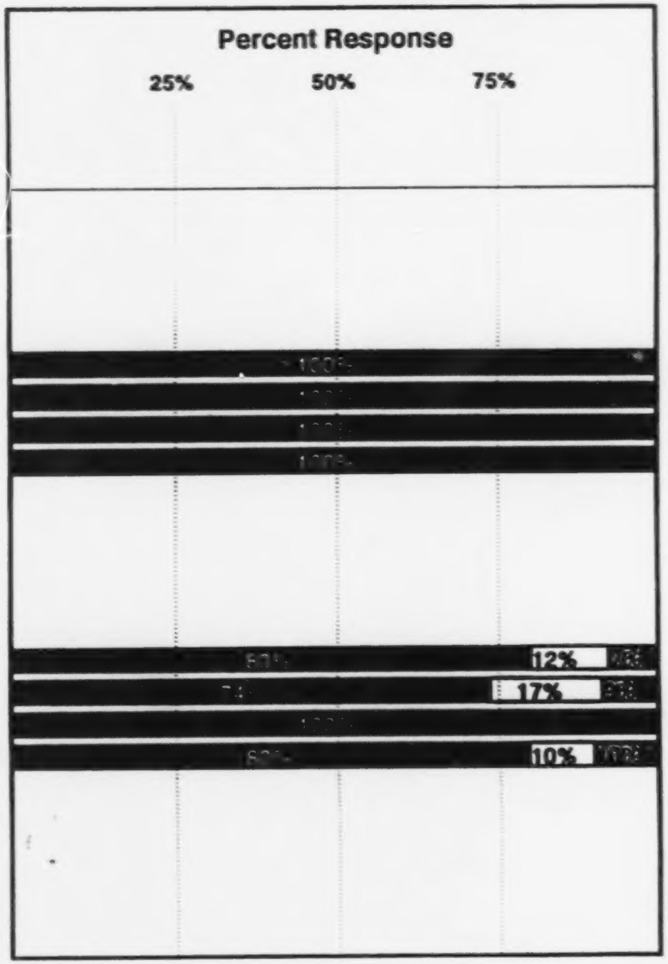
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satisfactory		Great	Don't Know	Number of Respondents
Warm and loving caregivers.							
Overall	0%	0%	0%	14%	86%	0%	43
Waimea Preschool	0%	0%	0%	14%	86%	0%	21
Waimea Elementary	0%	0%	0%	13%	88%	0%	8
Kona Campus	0%	0%	0%	14%	86%	0%	14
Keeping parents informed.							
Overall	0%	7%	12%	32%	49%	0%	41
Waimea Preschool	0%	9%	17%	26%	48%	0%	23
Waimea Elementary	0%	0%	0%	50%	50%	0%	8
Kona Campus	0%	10%	10%	30%	50%	0%	10



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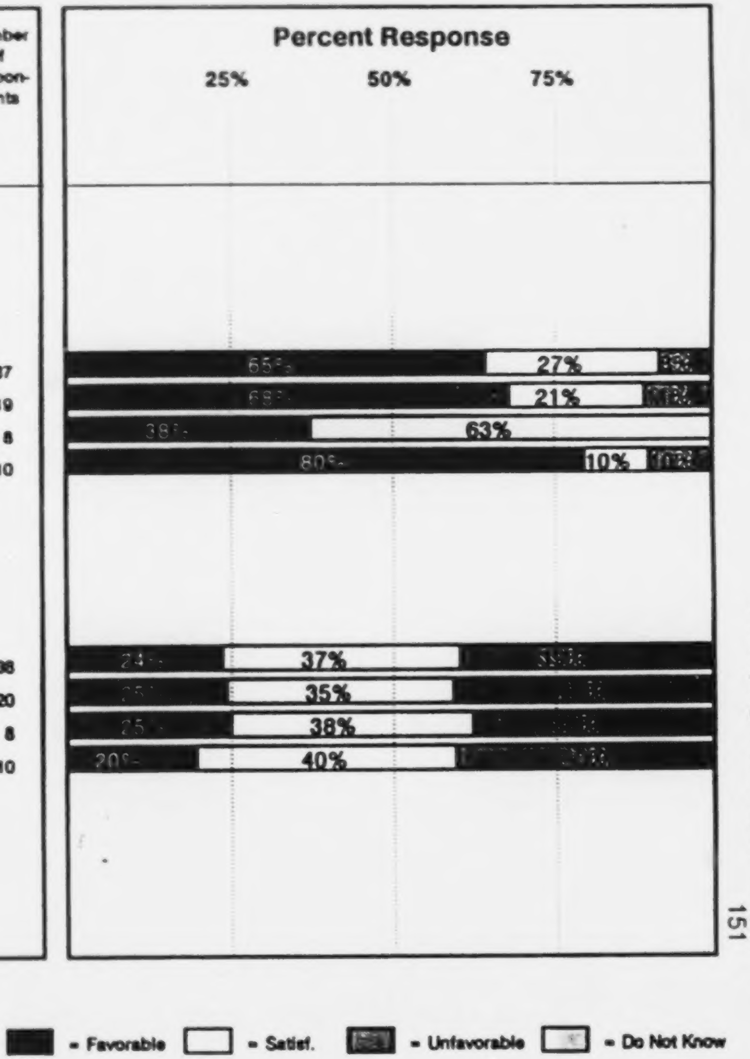
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
School and parents work as a team.							
Overall	3%	5%	27%	32%	32%	0%	37
Waimea Preschool	5%	5%	21%	37%	32%	0%	19
Waimea Elementary	0%	0%	63%	0%	38%	0%	8
Kona Campus	0%	10%	10%	50%	30%	0%	10
Affordability							
Overall	5%	34%	37%	16%	8%	0%	38
Waimea Preschool	5%	35%	35%	15%	10%	0%	20
Waimea Elementary	0%	38%	38%	25%	0%	0%	8
Kona Campus	10%	30%	40%	10%	10%	0%	10



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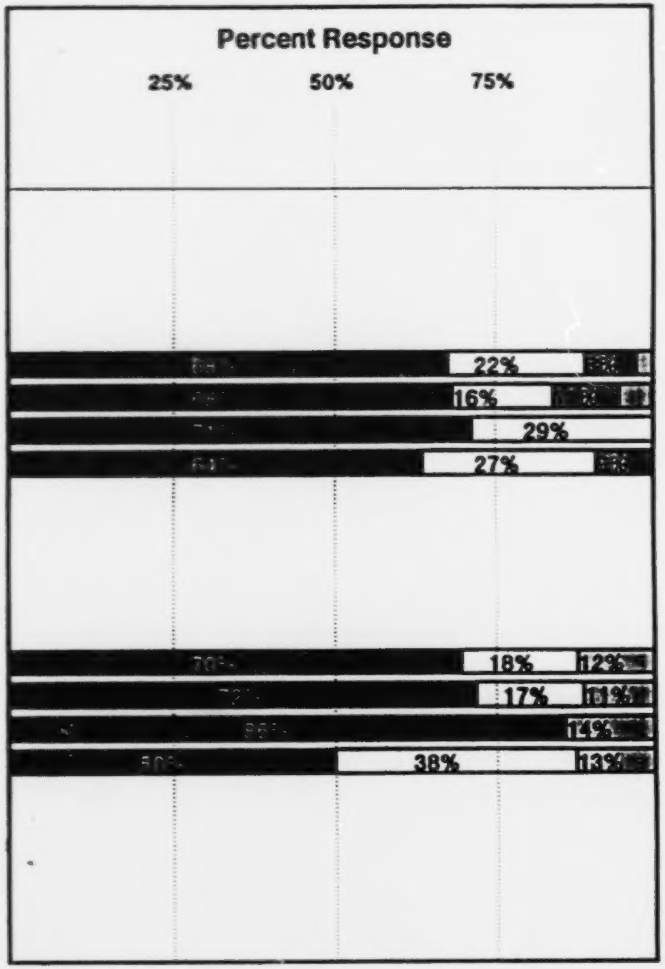
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satisfactory		Great	Don't Know	Number of Respondents
Flexible hours.							
Overall	3%	5%	22%	32%	35%	3%	37
Waimea Preschool	5%	5%	16%	26%	42%	5%	19
Waimea Elementary	0%	0%	29%	43%	29%	0%	7
Kona Campus	0%	9%	27%	36%	27%	0%	11
Parent education classes.							
Overall	0%	0%	18%	39%	30%	12%	33
Waimea Preschool	0%	0%	17%	28%	44%	11%	18
Waimea Elementary	0%	0%	0%	71%	14%	14%	7
Kona Campus	0%	0%	38%	38%	13%	13%	8



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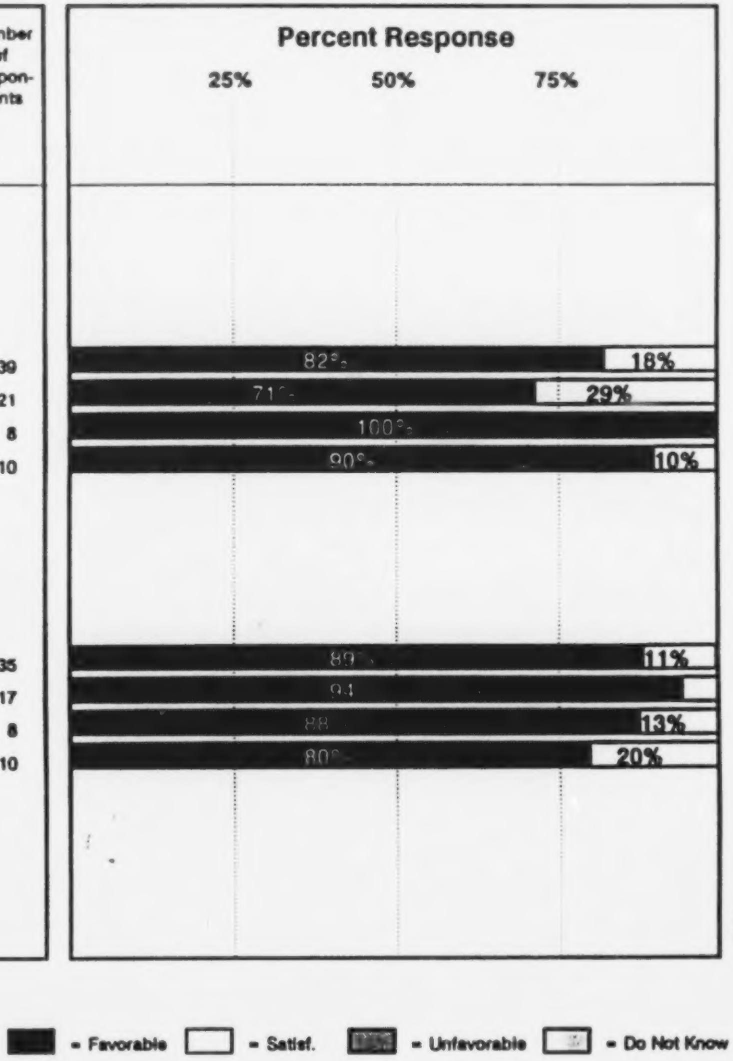
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satisfactory		Great	Don't Know	Number of Respondents
Individualized attention.							
- Overall	0%	0%	18%	36%	46%	0%	39
Waimea Preschool	0%	0%	29%	33%	38%	0%	21
Waimea Elementary	0%	0%	0%	38%	63%	0%	8
Kona Campus	0%	0%	10%	40%	50%	0%	10
Easy acces to the school location.							
Overall	0%	0%	11%	37%	51%	0%	35
Waimea Preschool	0%	0%	6%	35%	59%	0%	17
Waimea Elementary	0%	0%	13%	38%	50%	0%	8
Kona Campus	0%	0%	20%	40%	40%	0%	10



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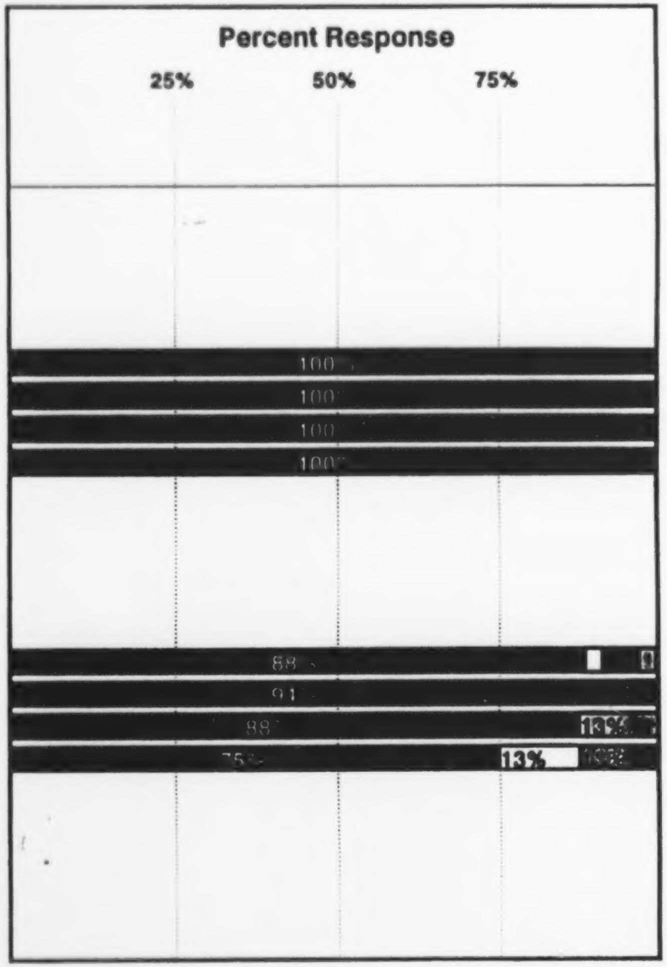
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Classrooms open to parents for observation							
Overall	0%	0%	0%	33%	67%	0%	36
Waimea Preschool	0%	0%	0%	32%	68%	0%	19
Waimea Elementary	0%	0%	0%	38%	63%	0%	8
Kona Campus	0%	0%	0%	33%	67%	0%	9
Classrooms open to parents for participation							
Overall	0%	6%	3%	21%	68%	3%	34
Waimea Preschool	0%	6%	0%	22%	72%	0%	18
Waimea Elementary	0%	0%	0%	13%	75%	13%	8
Kona Campus	0%	13%	13%	25%	50%	0%	8



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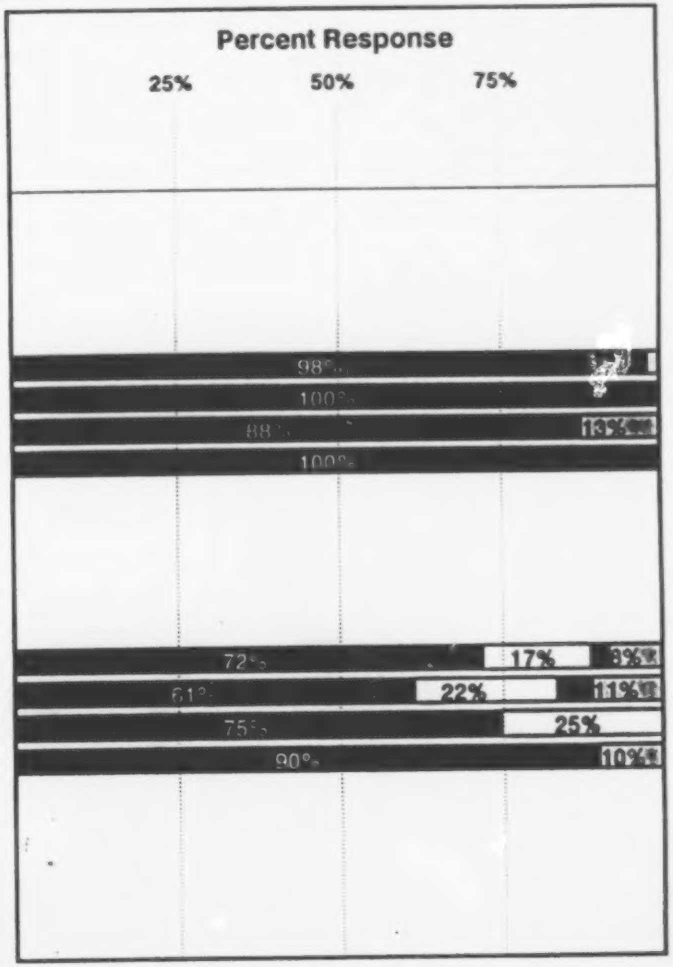
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Fosters self-esteem.							
Overall	0%	0%	0%	31%	67%	2%	45
Waimea Preschool	0%	0%	0%	29%	71%	0%	24
Waimea Elementary	0%	0%	0%	13%	75%	13%	8
Kona Campus	0%	0%	0%	46%	54%	0%	13
Strong academic program.							
Overall	0%	3%	17%	44%	28%	8%	36
Waimea Preschool	0%	6%	22%	39%	22%	11%	18
Waimea Elementary	0%	0%	25%	50%	25%	0%	8
Kona Campus	0%	0%	0%	50%	40%	10%	10



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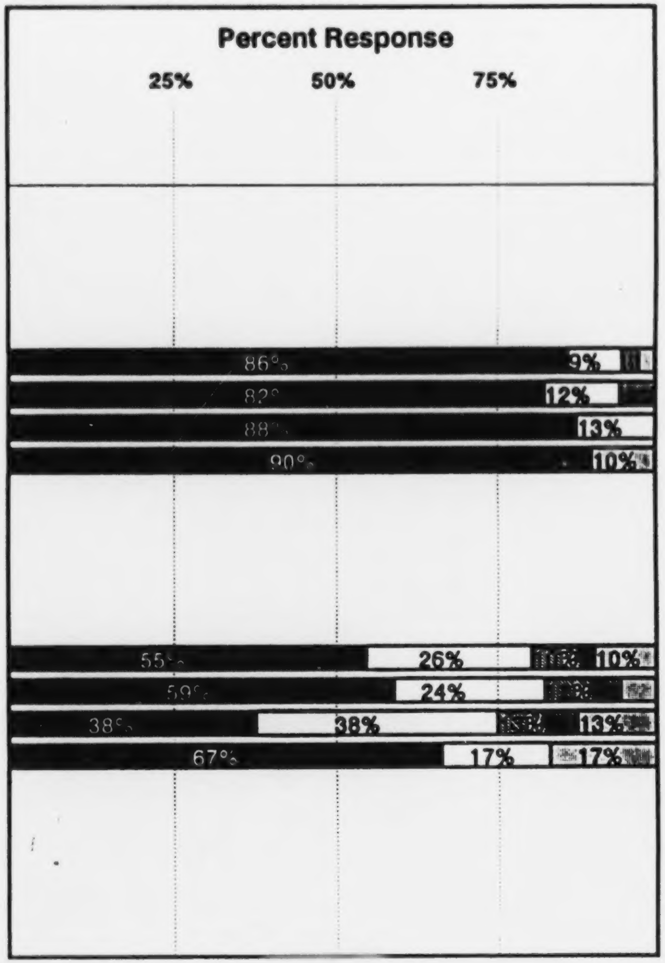
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Strong basic curriculum							
Overall	0%	3%	9%	51%	34%	3%	35
Waimea Preschool	0%	6%	12%	53%	29%	0%	17
Waimea Elementary	0%	0%	13%	63%	25%	0%	8
Kona Campus	0%	0%	0%	40%	50%	10%	10
"Extracurricular" activities							
Overall	0%	10%	26%	23%	32%	10%	31
Waimea Preschool	0%	12%	24%	18%	41%	6%	17
Waimea Elementary	0%	13%	38%	13%	25%	13%	8
Kona Campus	0%	0%	17%	50%	17%	17%	6



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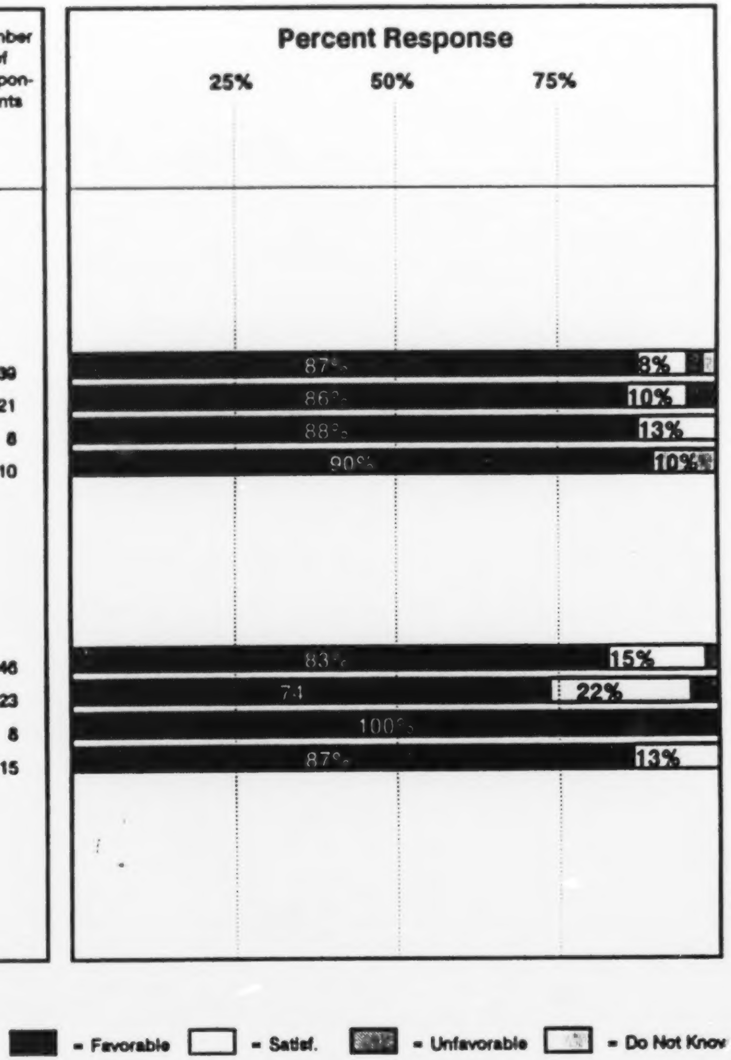
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Integrated, balanced curriculum.							
Overall	0%	3%	8%	38%	49%	3%	39
Waimea Preschool	0%	5%	10%	38%	48%	0%	21
Waimea Elementary	0%	0%	13%	50%	38%	0%	8
Kona Campus	0%	0%	0%	30%	60%	10%	10
Class size, teacher/student ratio.							
Overall	0%	2%	15%	37%	46%	0%	46
Waimea Preschool	0%	4%	22%	26%	48%	0%	23
Waimea Elementary	0%	0%	0%	38%	63%	0%	8
Kona Campus	0%	0%	13%	53%	33%	0%	15



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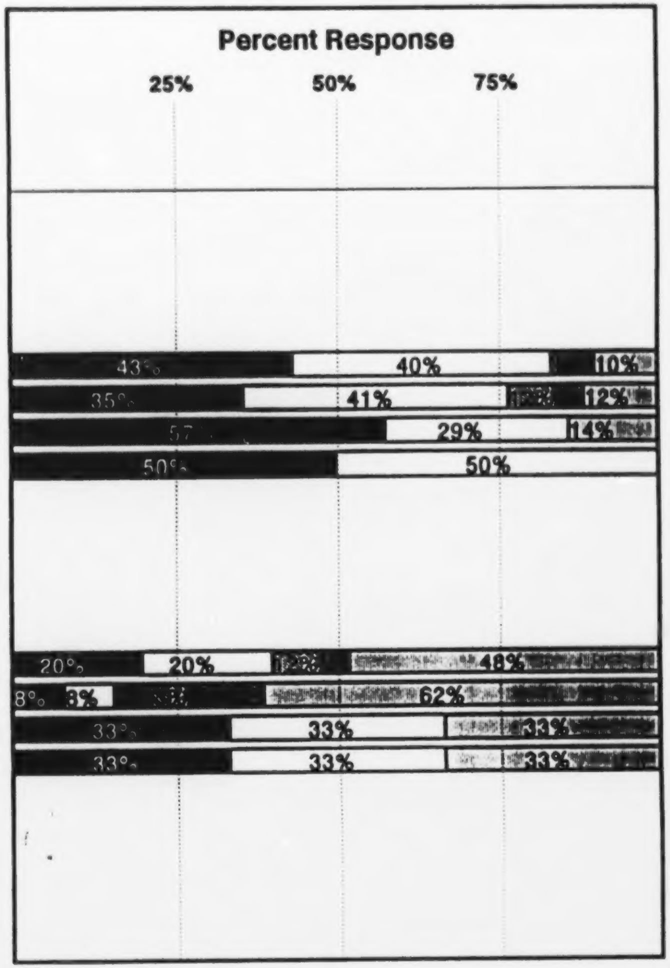
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Strong discipline.							
Overall	0%	7%	40%	33%	10%	10%	30
Waimea Preschool	0%	12%	41%	24%	12%	12%	17
Waimea Elementary	0%	0%	29%	57%	0%	14%	7
Kona Campus	0%	0%	50%	33%	17%	0%	6
Religious instruction.							
Overall	4%	8%	20%	12%	8%	48%	25
Waimea Preschool	8%	15%	8%	0%	8%	62%	13
Waimea Elementary	0%	0%	33%	33%	0%	33%	6
Kona Campus	0%	0%	33%	17%	17%	33%	6



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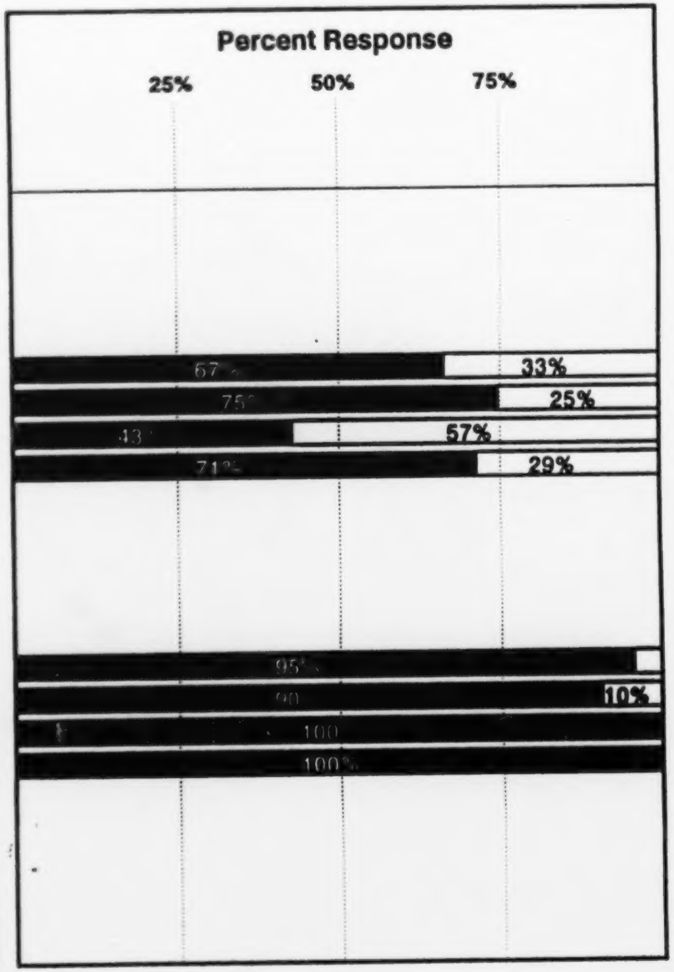
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satisfactory		Great	Don't Know	Number of Respondents
Bright & colorful decorations.							
Overall	0%	0%	33%	37%	30%	0%	30
Waimea Preschool	0%	0%	25%	25%	50%	0%	16
Waimea Elementary	0%	0%	57%	43%	0%	0%	7
Kona Campus	0%	0%	29%	57%	14%	0%	7
Children are happy.							
Overall	0%	0%	5%	23%	73%	0%	44
Waimea Preschool	0%	0%	10%	29%	62%	0%	21
Waimea Elementary	0%	0%	0%	0%	100%	0%	8
Kona Campus	0%	0%	0%	27%	73%	0%	15



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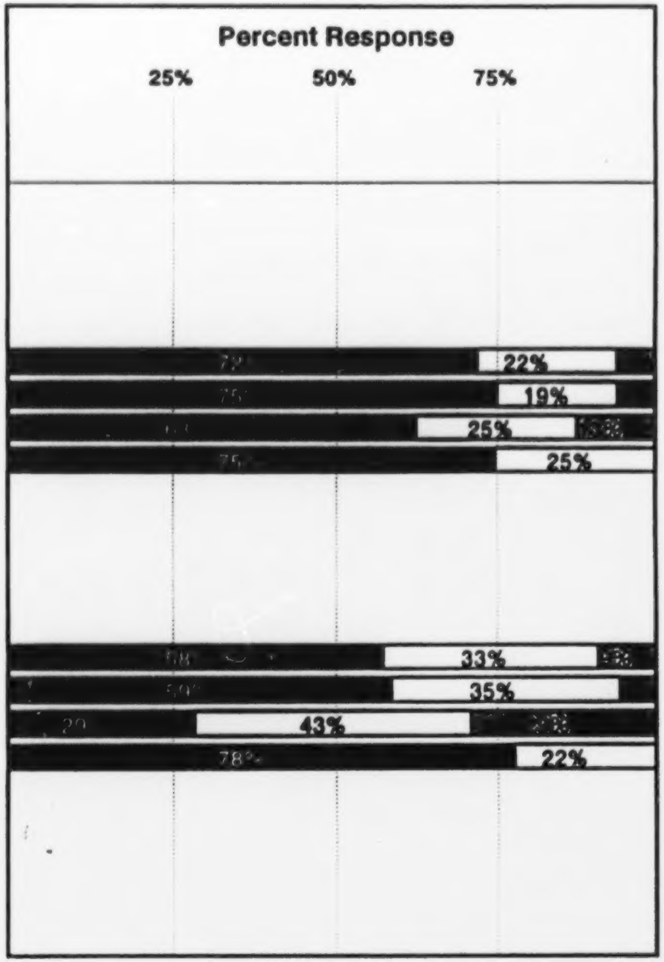
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Beautiful environment.							
Overall	0%	6%	22%	38%	34%	0%	32
Waimea Preschool	0%	6%	19%	44%	31%	0%	16
Waimea Elementary	0%	13%	25%	25%	38%	0%	8
Kona Campus	0%	0%	25%	38%	38%	0%	8
Facilities and buildings.							
Overall	0%	9%	33%	27%	30%	0%	33
Waimea Preschool	0%	6%	35%	41%	18%	0%	17
Waimea Elementary	0%	29%	43%	0%	29%	0%	7
Kona Campus	0%	0%	22%	22%	56%	0%	9



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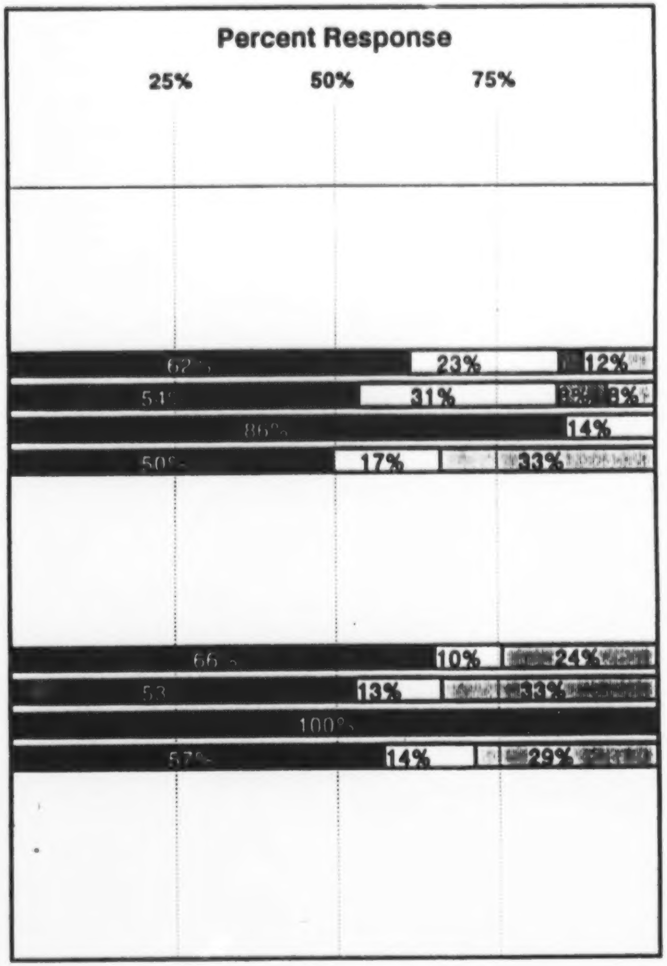
Hawai'i Early Childhood Education Program
Marketing Survey

ITEM COMPARISON REPORT
Overall

School Characteristics	Poor		Satis-factory		Great	Don't Know	Number of Respon-dents
Child's friends attend school.							
Overall	0%	4%	23%	38%	23%	12%	26
Waimea Preschool	0%	8%	31%	23%	31%	8%	13
Waimea Elementary	0%	0%	14%	57%	29%	0%	7
Kona Campus	0%	0%	17%	50%	0%	33%	6
Child's preference.							
Overall	0%	0%	10%	28%	38%	24%	29
Waimea Preschool	0%	0%	13%	13%	40%	33%	15
Waimea Elementary	0%	0%	0%	43%	57%	0%	7
Kona Campus	0%	0%	14%	43%	14%	29%	7



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APPENDIX F

Practicum Calendar

TEN WEEK CALENDAR

Week #1

Marketing Team

- Research data on 1993-94 on inquiry, enrollment, retention and market tool use. (16 hours) Information will be tallied from the student application forms on referral sources.
- A Marketing Team of board, staff and parents will meet. (2 hours) Verify team mission: create and implement an effective strategic marketing plan. Determine formats for data, and questions to be asked and answered by the data.

Whole Staff, Board and Interested Parents

- A faculty, board, parent group will meet to brainstorm and draft mission, and vision statements. (2.5 hours)
- Head will write up draft and return to participants for individual review.

Week #2

Marketing Team

- Create a marketing slogan from mission and vision work. (1 hour)
- Draft a market assessment questionnaire from descriptors in mission, vision work. (1.5 hours)

Whole Staff, Board and Interested Parents

- All faculty, board and participating parents will individually review the draft market assessment questionnaire, and draft mission and vision statements.

Week #3

Marketing Team

- Compile, graph and analyze data on inquiry, enrollment, retention and marketing tools. (16 hours)
- Brainstorm, prioritize and plan implementation of marketing strategies

for the coming year. (2 hours)

- Prioritize improvement opportunities and identify improvement criteria, if different than those already defined. (1.5 hours)
- Plan a marketing pilot effort. (1 hour)

Whole Staff, Board and Interested Parents

- Finalize mission and general vision statements from reviewed draft discussion. (1 hour)
- Brainstorm and draft value statements. (2.5 hours)

Week #4

Marketing Team

- Implement marketing strategies.

Whole Staff, Board and Interested Parents

- Individually review draft value statements.
- Discuss and make final draft of value statements.

Week #5

Marketing Team

- Design marketing survey from vision, mission and value work. (4 hours)

Whole Staff, Board and Interested Parents

- Brainstorm value matching tool. Confirm purpose and implementation strategy. Design format. Create draft.
- Get the tool draft to the participants for individual comment and revision. Test the tool on all faculty, and a small group of present and former parents, and make revisions as needed. (10 hours)

Week #6

Marketing Team

- Test run market survey. Review, revise, finalize. (6 hours)

Whole Staff, Board and Interested Parents

- Complete the tool to assess customer values, priorities, requirements and key quality characteristics. Test on faculty. Review, revise, finalize. (8 hours)

Week #7

Marketing Team

- Send marketing survey and values match tool out to parents. (4 hours to get out)

Whole Staff, Board and Interested Parents

- Complete surveys.

Week #8

Marketing Team

- Encourage survey return. (4 hours)
- Collect, compile and graph 1994-95 data for continuing analysis.

Whole Staff, Board and Interested Parents

- Meet to detail vision statement (3 hours)

Week #9

Marketing Team

- Collect survey and value matches from respondents.
- Compile, and format data from surveys (8 hours)
- Complete data formatting for 1994-95 (16 hours)

Week #10

Marketing Team

- Analyze data (4 hours)
- Plan next steps
- Analyze the results of the pilot marketing. Have inquiries increased?

Has enrollment increased? (2 hours)

- Compile a profile of the "customer pool" and of the customers we want to target. (4 hours)
- Meet (4 hours) and using data from our survey, analyze the root causes of our low enrollment and cash shortfall. (1 hour)

Whole Staff, Board and Interested Parents

- Celebrate